

IN THE UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF TEXAS
FORT WORTH DIVISION

AMERICAN AIRLINES, INC.,

§

Plaintiff,

§

v.

Civil Action No. 4:23-cv-00860-P

SKIPLAGGED, INC.,

§

Defendant.

§

**APPENDIX TO PLAINTIFF AMERICAN AIRLINES, INC.’S RESPONSE
AND BRIEF IN OPPOSITION TO SKIPLAGGED, INC.’S MOTION TO STRIKE
TESTIMONY AND REPORT OF PLAINTIFF’S EXPERT, DR. JERRY WIND**

In support of Plaintiff American Airlines, Inc.’s (“American”) Response and Brief in Opposition to Skiplagged, Inc.’s Motion to Strike Testimony and Report of Plaintiff’s Expert, Dr. Jerry Wind:

<u>Ex.</u>	<u>DOCUMENT DESCRIPTION</u>	<u>PAGE NOS.</u>
A	Declaration of Julia G. Wisenberg	App’x 001 – 003
A-1	Expert Report of Dr. Yoram (Jerry) Wind (excluding the appendices), served by American on April 23, 2024 (Partially Confidential)	App’x 004 – 094
A-2	Appendix A to Expert Report of Dr. Yoram (Jerry) Wind, served by American on April 23, 2024	App’x 095 – 219
A-3	Appendix C-2 to Expert Report of Dr. Yoram (Jerry) Wind, served by American on April 23, 2024	App’x 220 – 236
A-4	Transcript excerpts of the deposition of Dr. Yoram (Jerry) Wind, taken on July 8, 2024 (Partially Confidential)	App’x 237 – 247

Dated: September 3, 2024

Respectfully submitted,

/s/ Dee J. Kelly, Jr.

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CERTIFICATE OF SERVICE

I certify that on September 3, 2024, I served the foregoing document electronically in accordance with the Federal Rules of Civil Procedure.

/s/ Dee J. Kelly, Jr. _____
Dee J. Kelly, Jr.

Exhibit A

IN THE UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF TEXAS
FORT WORTH DIVISION

AMERICAN AIRLINES, INC.,

§

Plaintiff,

§

v.

Civil Action No. 4:23-cv-00860-P

SKIPLAGGED, INC.,

§

Defendant.

§

DECLARATION OF JULIA G. WISENBERG

STATE OF TEXAS

§

COUNTY OF TARRANT

§

1. My name is Julia G. Wisenberg. I am over the age of 21 and competent to make this declaration as authorized under 28 U.S.C. § 1746. My business address is 201 Main Street, Suite 2500, Fort Worth, Texas 76102.

2. I make this declaration in support of Plaintiff American Airlines, Inc.'s ("American") Response and Brief in Opposition to Skiplagged, Inc.'s Motion to Strike Testimony and Report of Plaintiff's Expert, Dr. Jerry Wind.

3. Attached as Exhibit A-1 is a true and correct copy of the Expert Report of Dr. Yoram (Jerry) Wind (excluding the appendices), served by American on April 23, 2024.

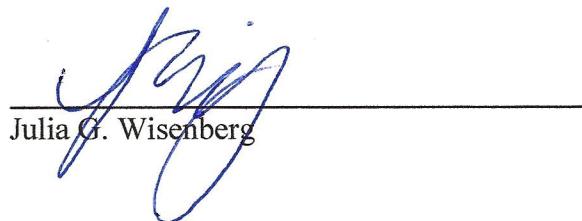
4. Attached as Exhibit A-2 is a true and correct copy of Appendix A to Expert Report of Dr. Yoram (Jerry) Wind, served by American on April 23, 2024.

5. Attached as Exhibit A-3 is a true and correct copy of Appendix C-2 to Expert Report of Dr. Yoram (Jerry) Wind, served by American on April 23, 2024.

6. Attached as Exhibit A-4 is a true and correct copy of transcript excerpts of the deposition of Dr. Yoram (Jerry) Wind, taken on July 8, 2024.

7. I declare under penalty of perjury that the foregoing is true and correct.

Executed on September 3, 2024.



Julia G. Wisenberg

A handwritten signature in blue ink, appearing to read "Julia G. Wisenberg", is written over a horizontal line. The signature is fluid and cursive.

Exhibit A-1

Dr. Yoram (Jerry) Wind
President, Wind Associates
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Philadelphia, PA 19103
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**IN THE UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF TEXAS
FORT WORTH DIVISION**

AMERICAN AIRLINES, INC.,	§	
	§	
Plaintiff,	§	
	§	
v.	§	Civil Action No. 4:23-cv-00860-P
	§	
SKIPLAGGED, INC.,	§	
	§	
Defendant.	§	
	§	

EXPERT REPORT OF PROFESSOR YORAM (JERRY) WIND

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I. **BACKGROUND AND OBJECTIVES**

A. **Background**

For decades, American Airlines, Inc. (“American” or “AA”) has been using its federally registered trade name and trademark “American Airlines” and its registered flight symbol design (collectively, the “American Marks”) to promote its products and services throughout the world. American carefully protects its flight, fare, schedule, and inventory data and content by providing this information only to its authorized agents, and by taking measures to ensure that only authorized agents of American are permitted to act on its behalf, to use and display its protected Marks, data, and content, and to issue tickets to passengers on American flights.

Skiplagged, Inc. (“Skiplagged”) owns and operates the website Skiplagged.com. Skiplagged is not an authorized agent of American. Instead, Skiplagged obtains data on American flights by obtaining data from other agents of American (in apparent violation of their contracts with American), and/or by developing computer programs to obtain this information from American’s website. Skiplagged.com allows users to search for, identify, and purchase and book American flights directly on Skiplagged.com. In doing so, Skiplagged uses and displays on its website American’s Marks and American’s fare, schedule, inventory, ticketing, and flight data. Skiplagged does not inform users that it is not authorized to issue tickets to passengers on American’s behalf. Because it is not an agent, Skiplagged is not authorized to use American’s marks, data or content to market, display or sell American tickets or services.

On August 17, 2023, American filed a lawsuit against Skiplagged, asserting, among other claims, trademark infringement and false designation of origin/unfair competition. American seeks an injunction to enjoin Skiplagged from, among other things, continuing its infringing use of American’s Marks; publishing American’s flight/fare content on Skiplagged’s website; selling or

re-selling American flights, fares, or other products; holding itself out as an authorized agent of American or continuing to act in an agency capacity for American; or displaying or otherwise using the American Marks for commercial gain.

Having reviewed the complaint and various screenshots of American's and Skiplagged's websites, I designed multiple consumer survey experiments to evaluate (1) the likelihood and degree of confusion among consumers as to Skiplagged's affiliation, connection, or association with American and/or as to American's sponsorship, approval, or authorization of Skiplagged's services in offering and facilitating the sale of American flights; and (2) the degree of consumer deception associated with Skiplagged's offerings. As explained below and based on my analysis of the results of these consumer surveys, I have concluded with a reasonable degree of expert certainty that Skiplagged's activities (1) have generated confusion in the marketplace regarding Skiplagged's affiliation, connection, or association with American and American's sponsorship, approval, or authorization of Skiplagged's services, and (2) deceive consumers about the risks associated with its products/services.

B. Objectives

I was retained by Greenberg Traurig, LLP, and Kelly Hart & Hallman, LLP, counsel for American, to assess whether, and to what extent, Skiplagged's published content and offerings on Skiplagged.com relating to American flights has generated confusion and deception in the marketplace, including as it relates to Skiplagged's perceived association with and/or authorization or sponsorship from American. To accomplish this objective, I considered whether Skiplagged's uses of the American Marks and data were likely to cause, or have caused, confusion amongst consumers who have booked airline tickets using a third party website in the past year, or who plan to do so in the coming year.

The purpose of these experiments was to determine, respectively, whether participants: (A) exhibited confusion about whether Skiplagged is an authorized agent of American; (B) exhibited other confusion about the relationship between Skiplagged and American; (C) exhibited confusion or deception about the fees and total cost charged by Skiplagged; and (D) exhibited confusion about the risks involved in buying “hidden city” tickets from Skiplagged.

II. QUALIFICATIONS

I am the Lauder Professor Emeritus and Professor of Marketing at the Wharton School of the University of Pennsylvania. I joined the Wharton staff in 1967, upon receipt of my doctorate from Stanford University. I took Emeritus status in July 2017. I am also the President of Wind Associates Inc, A marketing and business consulting firm.

Publications: I have been a regular contributor to the marketing field, including 30 books and more than 300 papers, articles, and monographs. My books and articles, which are frequently cited by other authors, encompass marketing strategy, marketing research, new product and market development, consumer behavior, organizational buying behavior, advertising, and global marketing strategy.

Editorships: I have served as Editor-In-Chief of the Journal of Marketing, as a guest editor of the major marketing journals, and on the policy boards of the Journal of Consumer Research and Marketing Science. I have been on the editorial boards of the major marketing journals. I founded Wharton School Publishing and served as its first editor from 2003 to 2008. Currently, I serve as guest editor of a special issue of Management Business Review (MBR) on AI for Customer Engagement.

Teaching, Research, and Consulting: Since 1967, I have taught MBA, Ph.D., and executive development courses on a wide range of marketing topics. I am currently developing a Coursera course on Creativity (for all ages and professions). I was the founding Director of the Wharton

think tank – The SEI Center for Advanced Studies in Management and directed it from 1988 to 2018. I have consulted extensively for Fortune 500 firms on marketing issues and marketing-driven business strategy. I am a trustee of Philadelphia Museum of Art, Curtis Institute of Music and Grounds for Sculpture. I am also an advisor for startups and non-profit organizations. In my teaching, research, consulting, editorial, and university positions, I have designed, conducted, and evaluated thousands of marketing and consumer research studies, including for use by businesses.

Awards: I have received numerous awards for my work, including the four major marketing awards—The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996), and MIT’s Buck Weaver Award (2007)—and received the first Faculty Impact Award by Wharton Alumni (1993). I was elected to the Attitude Research Hall of Fame in 1984 and have also been honored with research awards, including two Alpha Kappa Psi Foundation awards. In 2001, I was selected as one of the ten grand Auteurs in Marketing, and in 2003 I received the Elsevier Science Distinguished Scholar Award of the Society for Marketing Advances. In 2010, I was selected as one of the Ten Legends of Marketing and Sage Publication published eight volumes of my writings. In 2017, I was one of four people inducted into the Marketing Hall of Fame, an honor awarded annually to individuals who have made an outstanding contribution to the marketing profession. In 2021, I received an Honorary Doctorate from Reichman University (Israel), a university I co-founded in 1994. More recently (2023) I received the International Marketing Trend Conference Award.

Expert Witness Experience: I have conducted and evaluated marketing and consumer research for use in litigation, have been qualified as a marketing and survey research expert in court proceedings, and have testified at deposition and trial in federal courts.

Relevant Qualifications for this Case: Academic and Industry expert Re marketing, marketing strategy, consumer behavior, marketing research, and advertising.

Attached as **Appendix A** to this Report is a copy of my brief biography, my full resume, a list of my publications, and a list of cases in which I testified since 2018.

Compensation: My compensation is at my regular consulting rate of \$1200 per hour and is not contingent on my opinions or the outcome of this litigation.

III. SUMMARY OF OPINION

My expert opinion is that Skiplagged's hidden city and non-hidden city ticket offerings have the following negative impact on consumers:

- a. Skiplagged confuses consumers into believing that Skiplagged is associated with or authorized by American (either as an authorized travel agent for American or as having some other direct relationship with American);
- b. Skiplagged deceives consumers into believing that purchasing a regular, non-hidden city ticket on Skiplagged.com is cheaper than purchasing the same flight(s) from American directly; and
- c. Skiplagged deceives consumers of hidden city tickets by not effectively disclosing to them all of the serious risks and/or consequences imposed by airlines in connection with hidden city tickets.

My conclusions are based on the following:

1. Two consumer experiments in which test groups saw a Skiplagged.com web site offering for either a hidden city flight or non-hidden city ticket. Two control groups saw a corresponding ticket offered on Expedia.com.
 - The findings of these experiments showed significant levels of confusion and deception among consumers.
2. Four independent sets of data, all of which validate the findings of the consumer experiments. These included:
 - a. Actual complaints to AA;
 - b. Actual complaints to Skiplagged;
 - c. Analysis of consumer conversations on social networks; and
 - d. Insights from consumer behavior and advertising and marketing theories and findings.

IV. METHODOLOGY

To determine if Skiplagged's practices lead consumers to (a) perceive that they are an authorized agent of (or have other association with) American Airlines and (b) be deceived, I designed and implemented two consumer experiments and validated them against marketing and consumer behavior theories and findings.

A. The Voice of the Consumer – The Consumer Experiments

Because Skiplagged has two different airfare offerings—regular flight tickets and “hidden city” tickets—I designed two related experiments, one for each type of offering. The experiments also were designed to test the validity of the two major questions – namely, whether consumers (a) perceive Skiplagged as an authorized agent of American or having some other association with American, and (b) are deceived by Skiplagged’s advertising messages and offerings.

Regarding question (b), this included two conditions:

- (i) For the regular (non-hidden city) tickets: Skiplagged’s claim of providing the “cheapest regular flights;” and
- (ii) For the hidden city tickets: the adequacy of Skiplagged’s disclosures to consumers regarding the risks associated with booking a hidden city ticket.

To assure the validity of the findings, the research design relied heavily on responses to open-ended questions.

1. The Research Design

After qualifying the respondents (see universe and sample sections), the main questionnaire was based on 5 major and intercalated parts:

1. Showing the respondents in the test group the Skiplagged flight offering and showing the respondents in the control group the Expedia flight offering (see the Stimuli section) and assuring that they could see it clearly (Q0).
2. Asking an open-ended question with a follow up probing on how the respondent would

describe the offering to a friend (Q1).

3. Asking the typical confusion questions regarding connection or association (Q3) and permission or authorization (Q4-6), with follow up probes of the reasons for their response.
4. Asking a series of questions about the respondent's beliefs regarding the Skiplagged (or Expedia) offerings and the reasons for such beliefs (Q7-12), their awareness and usage of Skiplagged (or Expedia) (Q13), and feelings about Skiplagged's (or Expedia's) offerings and the reasons for such beliefs (Q14).
5. Showing the offering on AA.com for the same/corresponding flight ticket and asking the respondent about their reactions after having this information to compare to the Skiplagged (or Expedia) offering (Q15), their intentions to buy their next airline ticket from Skiplagged, and the reasons for their response (Q16).

The design was based on two experiments:

- a. Using the Skiplagged regular ticket as the stimulus for the test group vs. the ticket offering on Expedia for the same/corresponding flight, as a control group; and
- b. Using the Skiplagged hidden city ticket as the stimulus for the test group vs. the ticket offering on Expedia for a corresponding flight to the intended destination, as a control group.

Expedia was chosen as a control to show what the responses would be as to an *authorized agent* of American. The interpretation of the difference between the test and control groups is that the closer the results for Skiplagged are to those of Expedia the greater the perceived confusion and deception.

2. Universe and Sample

The Universe

The universe for each study included U.S. consumers who (a) booked a commercial flight in the past 12 months and/or intended to do so in the next 12 months, and (b) booked or intend to book their tickets through an online ticket website.

The Sample

The sample was drawn from the panel of Prodege. See Appendix C-1. An initial sample

matching the census gender, age, race, and geography assured the representativeness of the sample.

It was further screened for the relevant study criteria:

- Passed the CAPTCHA test (to ensure all participants were humans).
- They or members of their families do not work for
 - (ii) An advertising agency or public relations firm,
 - (iii) A market research firm or the market research department of a company,
 - (iv) A marketing firm or the marketing department of a company law or legal firm
 - (v) An airline, travel agency, or a company that sells airline and travel tickets
- If they wore glasses or contact lenses when using a mobile device, laptop, or desktop computer, they had them on.

The total sample included 600 respondents across all studies, as shown below.

Exhibit A

Sample Size

	Test	Control	Test	Control
	Skiplagged Ticket	Expedia Ticket	Skiplagged Hidden City Ticket	Expedia Ticket
Sample Size	146	155	144	155

3. The Stimuli

The stimuli are included in Appendix C-2 and were embedded in the 4 programmed questionnaires. Appendix C-3 includes the screen shots of one of these.

To ensure that a fair and representative sample booking was used as the stimuli for the consumer survey, we (a) generated 200 different pairings of randomized “tier 1” airports across the country to use for the respective origin/destination, (b) generated and assigned randomized flight dates for each pairing, (c) ran searches on Skiplagged.com (for one-way flights) using each set of randomized flight criteria, (d) simulated 200 “test buys” on Skiplagged.com by selecting the least expensive American flight option shown in the search results and proceeding through the booking process up to the final checkout page, and (e) recorded the final total cost charged by Skiplagged for each booking. Contemporaneous with each test booking on Skiplagged.com, we

searched for the same corresponding flights/itineraries on AA.com and recorded the total cost charged by American for each. Of those 200 samples, 41 of the test bookings were for a “hidden city” flight ticket. Then, to determine the particular booking that would provide the most realistic and representative stimuli for the survey, we (1) separated the hidden city bookings from the non-hidden city bookings, (2) calculated the average price differential (between Skiplagged.com vs. AA.com) across all hidden city bookings, and across all non-hidden city bookings, respectively, and (3) selected the hidden city test booking that was closest to the average price difference across the hidden city bookings, and selected the non-hidden city test booking that was closest to the average price difference across the non-hidden city bookings. Additionally, upon identifying and selecting the most representative hidden city booking and non-hidden city booking to use for the survey, we also collected and used as control stimuli the corresponding offerings on Expedia.com for the same flights shown on the respective Skiplagged.com and AA.com stimuli.

For the non-hidden city bookings, the average price differential was \$12.62 more expensive on Skiplagged.com than AA.com (the median difference was \$10.00 more on Skiplagged.com than AA.com). Thus, the stimuli selected for the survey was a booking that was \$10.00 more expensive on Skiplagged.com than AA.com. For the hidden city bookings, the average price differential was \$62.46 cheaper on Skiplagged.com than AA.com (and the median was \$28.80 cheaper on Skiplagged.com than AA.com). Thus, based on the specific test buys simulated, the stimuli selected for the survey was a booking that was \$55.00 cheaper on Skiplagged.com than AA.com. The selected stimuli are included in appendix C2 and in the programmed questionnaire.

4. The Questionnaire

- SCREENER -

INTRO

Thank you for your interest in today’s survey.

We value your opinions, and all of your answers will be held in the strictest confidence, so do not be afraid to answer

each question honestly. Remember, there are no right or wrong answers.

While you are completing the survey, we ask that you do not look at windows, tabs, or applications on any device. Please do not search the Internet or ask others for help regarding any questions. We are only interested in your own opinions. If you don't know the answer, that is okay, please select "Don't know" and move forward to the next question. Do not guess your answer.

[PN: ADD IN "CAPTCHA" AND INSTRUCTIONS.]

SA1.

First, please select the type of device you are using right now to access this page.

Select one.

A laptop or desktop computer	1	
A tablet (e.g., Samsung Galaxy Note or Apple iPad)	2	
A smartphone (e.g., Samsung Galaxy or Apple iPhone)	3	
Other device	4	[PN: TERMINATE HERE]

[PN: TERMINATE IF SA1=4.]

S0.

Before you continue, please read the following confidentiality and non-disclosure statement, and answer the question that follows.

I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information referenced in the interview and will not discuss this survey with anyone else. Also, I will not identify the nature of the product or service described in this survey.

Do you agree or disagree?

Select one.

I agree	1	
I disagree	2	[PN: TERMINATE HERE]

[PN: MUST AGREE AT S0 – PUNCH 1, OTHERWISE TERMINATE.]

S01.

Do you wear glasses or contact lenses when you're using a computer, tablet, or smartphone?

Select one.

Yes	1	
No	2	

[PN: ASK IF WEAR GLASSES OR CONTACT LENSES (S01=1)]

S02.

Are you currently wearing your glasses or contact lenses?

Select one.

Yes	1	
No	2	[PN: STOP/HOLD HERE]

[PN: IF NO STOP/HOLD ABOVE (S02=2), DISPLAY BELOW AND ALLOW RESPONDENT TO START AGAIN WHEN RETURNING.]

Please put on your glasses/contact lenses before you proceed with the survey.

INTRO.

Now, we'd like to ask you a few questions to make sure the survey is relevant to you.

S1.

Do you or does anyone in your household work for any of the following industries or companies?

Select all that apply.

An advertising agency or public relations firm	1	[PN: TERMINATE AFTER S7c]
A market research firm or the market research department of a company	2	[PN: TERMINATE AFTER S7c]
A marketing firm or the marketing department of a company	3	[PN: TERMINATE AFTER S7c]
An airline, travel agency, or a company that sells airline and travel tickets	4	[PN: TERMINATE AFTER S7c]
Any financial services company such as a bank, mutual fund company, brokerage firm, or investment firm	5	
A company that manufactures technology or electronics products	6	
A company that manufactures, distributes, or sells food or beverage products	7	
None of the above	99	[PN:ANCHOR,EXCLUSIVE]

[PN: IF WORK IN A RELATED INDUSTRY (PUNCHES 1-4), TERMINATE AFTER S7c.]

OTHERWISE, CONTINUE.]

S2a.

What is your age?

Enter a whole number.

	1	
Prefer not to answer	98	[PN: TERMINATE]

[PN: Allow 0-99. MUST BE 18+. TERMINATE HERE IF UNDER 18.]

[PN: HIDDEN QUESTION]

hS2b.

AGE

Under 18	1	S2a < 18	[PN: TERMINATE HERE]
18-24	2	S2a = 18-24	
24-34	3	S2a = 25-34	
35-44	4	S2a = 35-44	
45-54	5	S2a = 45-54	
55-64	6	S2a = 55-64	
65+	7	S2a = 65+	
Prefer not to answer	98	S2a = 98	[PN: TERMINATE HERE]

[PN: MUST BE 18+ TO QUALIFY. TERMINATE HERE IF UNDER 18 OR PREFER NOT TO ANSWER.]

S3.

Please record your gender identity.

Select one.

Male	1
Female	2

Non-binary	97
Other (Specify)	98
Prefer not to answer	99

S4.

Are you of Spanish, Hispanic or Latino/a origin?

Select one.

Yes	1
No	2

S5.

Which of the following ethnic groups do you identify most closely with?

Select one.

Asian/Pacific Islander	1
Black/African American	2
Native American or Alaska Native	3
White/Caucasian	4
Other (Specify)	97
Prefer not to answer	98

S6.

In which state do you reside?

Select one.

[PN: USE DROP DOWN LIST]

[PN: HIDDEN QUESTION]

S6a.

REGION

Northeast	1
South	2
Midwest	3
West	4

[PN: THE FOLLOWING QUESTIONS SHOULD BE SET UP AS A GRID WITH COLUMNS; YES, NO, DON'T KNOW. PLEASE ROTATE SO HALF THE RESPONDENTS WILL SEE YES/NO AND THE OTHER HALF WILL SEE NO/YES. KEEP ORDER OF YES/NO CONSISTENT THROUGHOUT ENTIRE SURVEY AND RECORD ORDER.]

S7a.

Which, if any, of the following activities **did you do in the past 12 months?** For each activity, please answer [MATCH ASSIGNED YES/NO ORDER: Yes, No,] or you “Don’t know.”

Select all that apply.

[PN: RANDOMIZE]

		Yes	No	Don't know
1	Booked a hotel room	(1)	(2)	(3)
2	Booked an airline ticket (on a commercial airline)	(1)	(2)	(3)

<u>3</u>	Booked a car rental	(1)	(2)	(3)
<u>4</u>	Made a restaurant reservation	(1)	(2)	(3)
<u>5</u>	Made an appointment for eye care	(1)	(2)	(3)
<u>6</u>	Made an appointment for auto service	(1)	(2)	(3)

S7b.

Which, if any, of the following activities are you **likely to do in the next 12 months?** For each activity, please answer **[MATCH ASSIGNED YES/NO ORDER:** Yes, No,] or you “Don’t know.”

Select all that apply.

[PN: HOLD IN THE SAME ORDER AS S7a]

		Yes	No	Don't know
<u>1</u>	Book a hotel room	(1)	(2)	(3)
<u>2</u>	Book an airline ticket (on a commercial airline)	(1)	(2)	(3)
<u>3</u>	Book a car rental	(1)	(2)	(3)
<u>4</u>	Make a restaurant reservation	(1)	(2)	(3)
<u>5</u>	Make an appointment for eye care	(1)	(2)	(3)
<u>6</u>	Make an appointment for auto service	(1)	(2)	(3)

[PN: HIDDEN QUESTION]**S7c.**

Commercial airline reservation status

Made a commercial airline reservation in the last 12 months only	<u>1</u>	S7a_2=1 AND S7b_2=2 OR 3	
Will make a commercial airline reservation in the next 12 months only	<u>2</u>	S7a_2=2 OR 3 AND S7b_2=1	
Both – reservation made in last 12 months AND will make in next 12 months	<u>3</u>	S7a_2=1 AND S7b_2=1	
Neither	<u>4</u>	S7a_2=2 OR 3 AND S7b_2=2 OR 3	[PN: TERMINATE]

[PN: CONTINUE IF MADE OR INTEND TO MAKE A COMMERCIAL AIRLINE RESERVATION (S7c=1-3). OTHERWISE, TERMINATE.]

S8a.**[ASK IF MADE AN AIRLINE RESERVATION IN THE PAST 12 MONTHS (S7c=1 OR 3)]**

In the **past 12 months**, when you made a reservation for an airline, which of the following methods did you use to make your reservation? For each option, please answer **[MATCH ASSIGNED YES/NO ORDER:** Yes, No,] or you “Don’t know.”

Select one response for each option.

In the past 12 months...

[PN: RANDOMIZE]

		Yes, I made a reservation for an airline through this method	No, I did not make a reservation for an airline through this method	Don't know
<u>1</u>	Through an online ticket website	<u>1</u>	<u>2</u>	<u>3</u>
<u>2</u>	Directly through an airline	<u>1</u>	<u>2</u>	<u>3</u>
<u>3</u>	Through a travel agency	<u>1</u>	<u>2</u>	<u>3</u>
<u>4</u>	Through a credit card company	<u>1</u>	<u>2</u>	<u>3</u>

5	Other (Specify____)	1 [PN: ANCHOR ROW]	2	3
---	---------------------	-----------------------	---	---

S8b.**[ASK IF PLANNING ON MAKING AN AIRLINE RESERVATION IN THE NEXT 12 MONTHS (S7c=2 OR 3)]**

In the **next 12 months**, when you make a reservation for an airline, which of the following methods will you use to make your reservation? For each option, please answer **[MATCH ASSIGNED YES/NO ORDER: Yes, No] or you "Don't know."**

Select one response for each option.

In the next 12 months...

[PN: HOLD IN THE SAME ORDER AS S8a]

		Yes, I <u>will make</u> a reservation for an airline through this method	No, I <u>will not</u> make a reservation for an airline through this method	Don't know
1	Through an online ticket website	1	2	3
2	Directly through an airline	1	2	3
3	Through a travel agency	1	2	3
4	Through a credit card company	1	2	3
5	Other (Specify)	1 [PN: ANCHOR ROW]	2	3

[PN: HIDDEN QUESTION]**S8c.****Online Ticket Website Usage Status**

Used online ticket website in the last 12 months only	1	S8a_1=1 AND S8b_1=2 OR 3 OR BLANK	
Will use an online ticket website in the next 12 months only	2	S8a_1=2 OR 3 OR BLANK AND S8b_1=1	
Both – Used online ticket website in the last 12 months AND will use an online ticket website in the next 12 months	3	S8a_1=1 AND S8b_1=1	
Neither	4	S8a_1=2 OR 3 OR BLANK AND S8b_1=2 OR 3 OR BLANK	[PN: TERMINATE]

[PN: CONTINUE IF PURCHASED OR INTEND TO PURCHASE TICKET THROUGH AN ONLINE TICKET WEBSITE (S8c=1-3). OTHERWISE, TERMINATE.]

S9.

Which of the following sets of stripes appears in this order: RED, YELLOW, GREEN, BLUE?

Select one.

[RANDOMIZE]

[PN: PLEASE SHOW 4 SETS OF STRIPES OF 4 DIFFERENT COLORS, INCLUDING ONE THAT IS ORDERED RED, YELLOW, GREEN, BLUE]

[PN: TERMINATE IF RED, YELLOW, GREEN, BLUE ORDER NOT SELECTED]

[PN: TO QUALIFY FOR SURVEY, MUST MEET THE FOLLOWING CRITERIA:]

- Meets device qualifications S_{A1}=1,2,3
- Agree to terms S_{O1}=1
- If typically wears glasses or contact lenses while working on a computer, must be wearing them (if S_{O1}=1, then must be S_{O2}=1)
- Does not work in a sensitive industry (S_{I1}=5,6,7,99)
- Age 18+ (S_{2b}=2-6)
- Made or planning on making airline reservation (S_{7c}=1-3)
- Made or planning on using online ticket website (S_{8c}=1-3)

S10 – HIDDEN.

ASSIGN TO A CELL ON A LEAST FILL BASIS BASED ON AGE, GENDER AND REGION

Non-Hidden Cell 1	1
Non-Hidden Cell 2	2

- MAIN QUESTIONNAIRE -

INTRODUCTION

[PN: SHOW TO ALL]

Remember, please do not search the Internet, or ask others for help regarding any questions. We are only interested in your own opinions. If you don't know the answer, that is okay, please enter or select "Don't know" and move forward to the next question. Do not guess your answer.

After you click "Next" you will see a series of images screen.

Please take your time to review the images. Do not use the back button of your browser at any time or your information will be lost.

[PN: NEW SCREEN]

Imagine that you wanted to book a roundtrip airline flight from Santa Ana to Miami, and you decided to use the [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] website to book flights. Below is the output you received when checking for available flights. Please assume that you selected the flight boxed in red.

Please review this information the way that you normally do when reviewing and selecting airline flights online.

PN: IF CELL 1(S10=1) THEN SHOW:

HC – Cell 1 – Stimuli 1 – Page 1

HC – Cell 1 – Stimuli 1 – Page 2

HC – Cell 1 – Stimuli 1 – Page 3

HC – Cell 1 – Stimuli 1 – Page 4

PN: IF CELL 2 (S10=2) THEN SHOW:

HC – Cell 2 – Stimuli 1 – Page 1

HC – Cell 2 – Stimuli 1 – Page 2

Q0.

Flight Information Link: **[PN: INSERT FIRST SET OF STIMULI]**

Were you able to see the images **clearly**?

Select one.

Yes, I was able to clearly see the images and read the words on the screen	1	[PN: CONTINUE TO Q1]
No, I was not able to clearly see the images and read the words on the screen	2	[PN: RE-SHOW STIMULUS AND ASK THIS QUESTION AGAIN]

[PN: MUST CONFIRM SAW IMAGES CLEARLY. DO NOT CONTINUE TO Q1a UNLESS Q0=1. IF SELECTED Q0=2 A SECOND TIME TERMINATE]

[PN: IF Q0=2, DISPLAY THIS MESSAGE AND RE-SHOW THE IMAGE PAGE, THEN SHOW Q

AGAIN: We are going to show you the images again. Please look at the images carefully and click “Next” when you are ready to continue.]

Q1a.

Flight Information Link: **[PN: INSERT FIRST SET OF STIMULI]**

How would you describe the offering on this website to a friend?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	--------------------	------------------

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q1a. ASK IF PROVIDED AN ANSWER IN Q1a. – NE 99]

Q1b.

Flight Information Link: **[PN: INSERT FIRST SET OF STIMULI]**

Is there anything else?

Please enter your response below and be as detailed as possible.

[OPEN END TEXT BOX]

There is no other way I would describe it to a friend	99	EXCLUSIVE
---	--------------------	------------------

Q2.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Does the company that operates this website have a business connection or association with another company, or do you not know?

Select one.

[PN: ROTATE ORDER OF YES AND NO].

Yes, it has a business connection or association with another company	1
No, it does not have a business connection or association with another company	2
Don't know	3

[PN: IF YES AT Q2, ASK Q3a AND Q3b, ELSE SKIP TO Q4]

Q3a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Which other company does the company operating this website have a business connection or association with?

Please enter your response below and be as detailed as possible or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q3a. ASK IF PROVIDED AN ANSWER IN Q3a. – NE 99]

Q3b.

What makes you say that?

Please type your answer below or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

Q4.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Does the company that operates this website require permission or authorization from any other company, or do you not know?

Select one.

[PN: ROTATE ORDER OF YES AND NO].

Yes, it requires permission or authorization from another company	1
No, it does not require permission or authorization from another company	2
Don't know	3

[PN: IF YES AT Q4, ASK Q5a, Q5b, Q6a, AND Q6b, ELSE SKIP TO Q7]

Q5a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

From which company is permission or authorization required?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q5a. ASK IF PROVIDED AN ANSWER IN Q5a. – NE 99]

Q5b.

What makes you say that?

Please type your answer below or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: IF YES AT Q4 ASK Q6a]

Q6a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

For what do they need to get permission or authorization?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q6a. ASK IF PROVIDED AN ANSWER IN Q6a. – NE 99]

Q6b.

What makes you say that?

Please type your answer below or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

Q7a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

What do you believe is the relationship between [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] and the airline?

Select one.

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

[PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] is an authorized agent of the airline	1	
---	---	--

[PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] is not an authorized agent of the airline	2	
There is some other relationship between [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] and the airline	3	
Don't know	99	[ANCHOR]

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q7A. ASK IF PROVIDED AN ANSWER IN Q7a/NE 99]

Q7b

What makes you say that?

Please enter your response below and be as detailed as possible or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	-----------	------------------

Q8a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Based on your understanding of the [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] offerings, please select the option you believe is correct or you "Don't know."

Select one.

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

Buying tickets through [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] is cheaper than buying directly from the airline	1	
Buying tickets through [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] is not cheaper than buying directly from the airline	2	
Don't know	99	[ANCHOR]

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q8a. ASK IF PROVIDED AN ANSWER IN Q8a. – NE 99]

Q8b.

What makes you say that?

Please enter your response below and be as detailed as possible or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	-----------	------------------

Q9a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Based on your understanding of the [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] offerings, please select the option you believe is correct or you "Don't know."

Select one.

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

[PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] charges an additional fee on top of the airline's total ticket cost.	1	
[PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] does not charge an additional fee on top of the airline's total ticket cost.	2	
Don't know	99	[ANCHOR]

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q9a. ASK IF PROVIDED AN ANSWER IN Q9a. – NE 99]

Q9b

What makes you say that?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
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[PN: ASK ONLY IF THEY THINK THERE'S A FEE – Q9a=1]

Q10a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Based on your understanding of the [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] offerings, please select the option you believe is correct or you “Don’t know.”

Select one.

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

I believe the fee [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] charges for its services is reasonable	1	
I believe the fee [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] charges for its services is not reasonable	2	
N/A (I do not think [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] charges an additional fee on top of the airline's total cost)	3	
Don't know	99	[ANCHOR]

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q10a. ASK IF PROVIDED AN ANSWER IN Q10a. – NE 99]

Q10b.

What makes you say that?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

Q11a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Based on your understanding of the [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] offerings, please select the option you believe is correct or you “Don’t know.”

Select one.

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

[PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] is an authorized travel agency with access to fares I could not access via the airline	1	
[PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] is not an authorized travel agency and does not have access to fares I could access via the airline	2	

Don't know if [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] are an authorized travel agency	98	[ANCHOR]
Don't know if [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] have or do not have access to fares I could not access via the airline	99	[ANCHOR]

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q11a. ASK IF PROVIDED AN ANSWER IN Q11a. – NE 99]

Q11b

What makes you say that?

Please enter your response below and be as detailed as possible or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	-----------	------------------

Q12a.

Flight Information Link: **[PN: INSERT FIRST SET OF STIMULI]**

Based on your understanding of the [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] offerings, please select the option you believe is correct or "Don't know."

Select one.

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

A ticket bought through [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] is a valid ticket	1	
A ticket bought through [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] is not valid ticket	2	
Don't know	99	[ANCHOR]

[PN: TRIGGER QUESTION – SHOW ON THE SAME SCREEN AS Q12A. ASK IF PROVIDED AN ANSWER IN Q12A – NE 99]

Q12b

What makes you say that?

Please enter your response below and be as detailed as possible "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	-----------	------------------

Q12c.

Flight Information Link: **[PN: INSERT FIRST SET OF STIMULI]**

Based on your understanding of the [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] offerings, please select the option you believe is correct or "Don't know."

[PN: ROTATE THE ORDER OF PUNCHES 1 AND 2. RECORD ORDER.]

Select one.

The option offered by [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] carries no risk	1	
The option offered by [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] carries risks	2	
Don't know	99	[ANCHOR]

[PN: TRIGGER QUESTION – SHOW ON THE SAME SCREEN AS Q12C. ASK IF PROVIDED AN ANSWER IN Q12C – NE 99]

Q12d

What makes you say that?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: ASK IF CARRIES A RISK – Q12C/2]

Q12e.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

What are the risks associated with this ticket?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q12e. ASK IF PROVIDED AN ANSWER IN Q12e. – NE 99]

Q12f.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Are there any other risks?

Please enter your response below and be as detailed as possible.

[OPEN END TEXT BOX]

There is no other risks	99	EXCLUSIVE
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Q13a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Before today were you aware of [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”]?

[PN: ROTATE ORDER OF YES AND NO].

Yes	1
No	2
Don't know	3

[PN: ASK IF AWARE OF SKIPLAGGED/EXEDIA Q13a. = 1]

Q13b.

Have you ever used [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”]?

[PN: ROTATE ORDER OF YES AND NO].

Yes	1
No	2
Don't know	3

Q14a.

Flight Information Link: [PN: INSERT FIRST SET OF STIMULI]

Reflecting on the [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] offering and everything you know about them how do you feel about buying your next airline ticket from them?

Please enter your response below and be as detailed as possible or select “Don’t know.”

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION – SHOW ON THE SAME SCREEN AS Q14a. ASK IF PROVIDED AN ANSWER IN Q14a – NE 99]

Q14b.

Is there anything else?

Please enter your response below and be as detailed as possible.

[PN: OPEN END TEXT BOX]

There are no other reasons why I said that	99	EXCLUSIVE
--	----	-----------

INTRO

Let's imagine that you decide to compare the [PN: IF Cell 1 (S10=1): “Skiplagged”, IF Cell 2 (S10=2): “Expedia”] offer with the same flights available on the American Airlines website and you got the following results.

Please review this information the way that you normally do when reviewing and selecting airline flights online.

PN: SHOW ALL:

HC – Stimuli 2 – Page 1

HC – Stimuli 2 – Page 2

AFTER SHOWING STIMULI 2:

IF CELL 1(S10=1) THEN SHOW:

HC – Cell 1 – Stimuli 1 – Page 4

IF CELL 2 (S10=2) THEN SHOW:

HC – Cell 2 – Stimuli 1 – Page 2

[PN: NEW SCREEN only show for Cell 1 (S10=1)]

Now, please review the conditions associated with the Skiplagged offering versus American Airlines' policies. Please review this information the way that you normally do when reviewing and selecting airline flights online.

Q15a.

Flight Information Link: **[PN: INSERT STIMULI 1 FOLLOWED BY STIMULI 2]**

Comparing the results you got from **[PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]** and from the American Airlines website, how do you feel about the **[PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]** offering?

Please enter your response below and be as detailed as possible or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q15a. ASK IF PROVIDED AN ANSWER IN Q15a. – NE 99]

Q15b.

Is there anything else?

Please enter your response below and be as detailed as possible.

[OPEN END TEXT BOX]

There is nothing else that describes how I feel about the [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"] offerings	99	EXCLUSIVE
--	----	-----------

Q16a.

Flight Information Link: **[PN: INSERT STIMULI 1 FOLLOWED BY STIMULI 2]**

How likely would you be to consider buying your next airline ticket from **[PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]**?

Select one.

[PN: ROTATE WHETHER PUNCHES ARE SHOWN FROM 1 – 5 OR 5 – 1. RECORD WHAT WAS SEEN]

Definitely would not consider buying my next airline tickets from [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]	1	
Probably would not consider buying my next airline tickets from [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]	2	
May or may not consider buying my next airline tickets from [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]	3	
Probably would consider buying my next airline tickets from [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]	4	
Definitely would consider buying my next airline tickets from [PN: IF Cell 1 (S10=1): "Skiplagged", IF Cell 2 (S10=2): "Expedia"]	5	
Do not know	99	[ANCHOR]

[PN: TRIGGER QUESTION - SHOW ON THE SAME SCREEN AS Q16a AFTER THEY PROVIDED AN ANSWER – 1-5 AND 99]

Q16b.

What made you say that you **[INSERT ANSWER FROM Q16A IN LOWER CASE]**?

Please enter your response below and be as detailed as possible or select "Don't know."

[OPEN END TEXT BOX]

Don't know	99	EXCLUSIVE
------------	----	-----------

[PN: TRIGGER QUESTION – SHOW ON THE SAME SCREEN AS Q16b. ASK IF PROVIDED AN ANSWER IN Q16b – NE 99]

Q16c.

Is there anything else?

Please enter your response below and be as detailed as possible.

[PN: OPEN END TEXT BOX]

There are no other reasons why I said that	99	EXCLUSIVE
--	----	-----------

[PN: ASK ALL]

D1.

For quality control purposes, please enter the year you were born.

[PN: ALLOW NUMBERS RANGING FROM 1922-2023]

1

[PN: Must come within 1 year of actual age (S2a) or flag]

[PN: SHOW FOR ALL AT THE END OF THE SURVEY - NEW SCREEN]

Thank you very much for completing this survey. We truly value your response and appreciate you taking time to share your opinions with us.

5. Data Collection and Quality Control

The data collection was conducted by Radius Global.¹ They worked under my direction, formatted, and programmed the questionnaires, coordinated the data collection process, analyzed the data, and prepared the Appendices for this report. The data collection was done between April 10 – 15, 2024 and resulted in 600 respondents. The data collection was stopped after the first day of interviewing (as a pretest). Since none of the respondents had any difficulties with the questionnaire, we continued with the data collection.

In addition to the quality assurance questions included as part of the screening questions, Radius employed the following quality control procedures:

- Surveys hosted on secure encrypted servers.

¹ Radius Global is a leading provider of research, data, analytics, insights, and marketing intelligence. See <https://radiusinsights.com/>

- Data checks implemented:
 - Check for duplicate IP addresses to keep respondents from taking the survey more than once;
 - CAPTCHA;
 - Speeders removed from data;
 - Open-ended responses reviewed to ensure respondent is paying attention/providing meaningful answers.

6. Analysis

The analysis included:

- Analysis of the verbatim responses regarding the reasons for the confusion and perceived deception. This analysis followed the scientific approach for content analysis, including coding the data by (a) involving two independent coders who were not familiar with the objective of the study or its sponsors, and (b) a procedure for resolving conflicts between the two coders; and
- Computer tabulations of the results.
- Testing for the statistical significance of the difference between the test and control groups of each of the two stimuli. The Hidden City and Non-Hidden City offerings

B. **Validating the consumer experiments with other data and relevant marketing and consumer behavior theories and findings**

To validate the findings of our customer experiments we looked at other relevant data sets that included.

1. Consumer complaints to AA about Skiplagged re confusion and perceived deception.

During the period 1/1/2018 – 3/6/2024, the AA customer complaint database identified 88 complaints with the terms “Skiplagged” or “Skiplag”. Eighty (80) of the complaints dealt with Hidden City. The analysis was done by a litigation support company using the following definitions:

Deception - any complaint where the customer misunderstood what they were buying. This included where the customer is confused because their itinerary has an extra leg beyond where they plan to get off; where the customer did not get the necessary visa or bring a passport for a ticket with where final destination is

international; where the customer does not understand why they couldn't check a bag; where the customer complains that they paid more booking through Skiplagged versus booking directly. This category also included complaints about consumer consequences, such as: did the customer get denied boarding; was the customer prevented from checking-in; did the customer have to rebook and pay a higher price; did the customer lose baggage when it was checked through to the destination; and any other instance where the customer had harm/loss/consequences as a result of their hidden city ticket.

Confusion – any complaint about role, authority, or relationship of Skiplagged vis a vis the airline. This included any complaint suggesting the customer misunderstood what Skiplagged could and could not do to support a customer after purchase, or the customer assumed Skiplagged could provide travel agency services; any complaint where the customer expected Skiplagged to reaccommodate, cancel, refund flight price, make meal selections or seat reservations; and any complaint where the customer thought Skiplagged is an approved booking partner or agent.

Other - all documents that do not fall under the above categories.

Analysis of the complaints revealed the following distribution.

- Confusion and Deception (n=22)
- Deception (n=57)
- Neither (n=7)

2. Consumer complaints to Skiplagged re confusion and perceived deception.

Skiplagged produced a total of 46,621 documents. Of those, 30,658 were emails with one of the following email addresses as a last-in-time sender or recipient:

- agent@skiplagged.com
- booking@skiplagged.com
- privacy@skiplagged.com
- support@skiplagged.com

These are Skiplagged' s customer support emails. The vast majority of these emails relate to AA bookings.

The documents are in a Relativity database. Using Relativity's Sampling tool (<https://help.relativity.com/RelativityOne/Content/Relativity/Sampling.htm>), we created a randomized 95/2.5 statistical sample. The sample was 1,464 emails. We categorized these documents as Deception, Consumer Confusion or Other, defined as set forth above.

Analysis of the complaints revealed the following distribution.

- Confusion (n=263)
- Deception (n=204)
- Confusion and Deception (n=47)
- Other (n=951)

The sampled data, when projected to the universe of complaints to the nearest thousand, suggests approximately 12,000 of the complaints reflect deception and/or confusion.

3. Consumer posts on social networks illustrating confusion and deception.

I directed Voluble² to identify and collect consumer comments posted online about Skiplagged. To identify consumer comments about Skiplagged, a search for social media posts that contain the term “skiplagged” or “skip lagged” was performed using Brandwatch, an industry-leading database that provides access to social media data. The search was limited to posts on X (formerly, Twitter) and Reddit, as these platforms returned the highest volume of consumer posts that mentioned Skiplagged. I then reviewed the posts returned by the search to identify those that were potentially relevant to my analysis.

4. Consumer behavior and advertising theories and findings that support the validity of our empirical findings.

The purpose of this additional analysis is to test to what extent consumer behavior and advertising theories and findings are consistent with or support the findings of our experiments

² Voluble is a consulting firm experienced in analyzing social media and other online posts to provide insights for litigation. Voluble is division of Global Business Experts Group (GBX), a litigation consulting firm, that has worked with dozens of clients on a variety of matters involving intellectual property and other issues.

and the other independent data.

V. FINDINGS

A. The results of the consumer experiments are presented in the five sections corresponding to the five key areas of interest addressed by the experiments.

1. Consumers' awareness and usage of Skiplagged (vs. Expedia)

As can be seen in Exhibit 1 below, as expected most respondents are familiar with Expedia.

In contrast only a small % (between 14 and 18%) are familiar with Skiplagged. Yet, among the segment familiar with Skiplagged, the percent who used Skiplagged for regular tickets is similar to the % of Expedia users among those aware of them. But the % of users of Skiplagged Hidden city tickets are much lower.

Exhibit 1

Consumers' awareness and usage of Skiplagged (and Expedia) (Q13a & 13b)

Based on:	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Awareness (Q13a)				
Yes	17.8%	92.9%*	13.9%	96.8%*
No	81.5%*	6.5%	86.1%*	3.2%
DK	0.7%	0.6%	0.0%	0.0%
Based on aware of Skiplagged (Expedia) Usage (Q13b):	Skiplagged Ticket (n=26)	Expedia Ticket (n=144)	Skiplagged Hidden City Ticket (n=20)	Expedia Ticket (n=150)
Yes	73.1%	77.8%	50.0%	80.0%*
No	26.9%	21.5%	45.0%*	20.0%
DK	0.0%	0.7%	5.0%*	0.0%

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Note: Awareness and Usage for Test Cells are related to Skiplagged. Awareness and Usage for Control Cells is related to Expedia.

2. Consumers' perceptions of Skiplagged (vs. Expedia)

Exhibit 2 includes illustrative responses to the open ended question "how would you describe the offering on this (Skiplagged) website to a friend?" For a full listing of these responses, see the full verbatim in Appendix C-6.

Exhibit 2**Illustrative Consumers' Description of the Skiplagged offering
(Q1a:b) Test Stimuli**

Skiplagged Ticket (n=146)
Illustrative responses
Flight booking american airlines
A good offer that benefits the buyer.
A way to book flights cheaper
I think it's not a bad price it's cheaper than most [else] basically your only going to pay 150 for a few hours longer but at least you'll get there
Scam
There are good prices that you should check it out

**Illustrative Consumers' Description of the Skiplagged Hidden City offering
(Q1a:b) Test Stimuli**

Skiplagged Hidden City Ticket (n=144)
Illustrative responses
Very good website for booking flights
It's a offering for airline tickets
It's a good awful price wise but I thought the airlines did not allow this
The site is clear about baggage requirements and says the airlines don't like this method.
It's a cheaper alternative to most options. No checked bags, but it's worth it.
Receive a discount compared to the actual airline site.

At the end of the questioning re Skiplagged (Expedia), we asked the respondents in Question 14a “reflecting on the Skiplagged (Expedia) offering and everything you know about them how do you feel about buying your next airline ticket from them?” The responses were coded into positive, neutral, or negative sentiment and presented in Exhibit 3. Examination of these results show that less than 12% of the respondents had negative sentiment toward Skiplagged. Yet, this is more than double the negative sentiment toward Expedia. While the positive sentiments toward Skiplagged are significantly below that of Expedia, they are still very high -- 45% among the Non-Hidden City ticket customers and 35% among the Hidden City customers.

Exhibit 3
Reflections on Skiplagged and Expedia
(Q14a:b)

Consumer Reactions of Skiplagged (Expedia):	% of Respondents			
	Test	Control	Test	Control
Skiplagged Ticket (n=146)	Expedia Ticket (n=155)	Skiplagged Hidden City Ticket (n=144)	Expedia Ticket (n=155)	
Negative sentiment towards Skiplagged (Expedia)	11.0%*	4.5%	11.8%*	5.8%
Neutral sentiment towards Skiplagged (Expedia)	17.1%*	7.7%	25.7%*	9.0%
Positive sentiment towards Skiplagged (Expedia)	45.2%	71.6%*	35.4%	67.7%*
Don't Know	26.7%*	16.1%	27.1%*	17.4%

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Illustrative verbatim for all the sentiments are presented in Exhibits 3a, b and c. For the full verbatim. See Appendix C-6.

Exhibit 3a
Reflections on Skiplagged and Expedia: Illustrative Negative Verbatims
(Q14a:b)

Test	Control	Test	Control
Skiplagged Ticket (n=16)	Expedia Ticket (n=7)	Skiplagged Hidden City Ticket (n=17)	Expedia Ticket (n=9)
I am not familiar with this website and would not be comfortable ordering tickets there.	I would rather book directly from website	I would not buy my next ticket from them because of the fees and how cluttered their website looked.	Likely buy directly from airline unless they offer a great deal
I have never heard of this company. It doesn't state whether your ticket is valid through the airlines purchased for.	I wouldn't buy from Expedia again I have had bad experiences when my flight was cancelled	Cautious as I have never heard of them	It is probably better to go direct through the airline
I will not be doing this because I will not end up on the no flight list.	I will be very careful	I would not buy the ticket	I usually find better rates if I just book the flight myself through the airlines
i have never heard of them before - so will be a bit wary	I dont like expedia	Fairly risky and might lose your money at the end	I will likely not unless it is much cheaper
I probably would still go through the airline website	No. I will stick to going to the direct airline I am flying with	I'm just not sure because it's making me seem like I shouldn't trust it	I will continue to use the airline website
Still not sure how reliable it would be	I likely will not use Expedia unless it offers something cheaper than I can find	Another online service trying to make money	I have never used Expedia personally, but I did use another similar site and was very displeased at all the "hidden" charges. So, I probably would not purchase a ticket through Expedia.

Exhibit 3b
Reflections on Skiplagged and Expedia: Illustrative Neutral Verbatims
(Q14a:b)

Test	Control	Test	Control
Skiplagged Ticket (n=25)	Expedia Ticket (n=12)	Skiplagged Hidden City Ticket (n=37)	Expedia Ticket (n=14)
I could do it but first I have to know more	I don't have any feelings if they offer a better price I'll use them	will look into it	I will definitely look into it. I have my own favorite websites that I use when I'm flying
Given proper reviews, maybe I'd checkmate out if it was legit or not and purchase one	Third party booking site that checks fees	May or may not	I would be on the fence. third parties are a concern to me
Not sure if I would purchase using this website, but I will definitely check them out for my next ticket to purchase	Would research to make I'm not paying more	It's a possibility I would need to do more research to confirm	I'm undecided. We just had to cancel some flights and it's not always clear who you're dealing with
Would have to do more research about validity of this site	not super comfortable, but will buy anyways	I will do more research	I would definitely look into it.
I would need to do some research on them before using them, I research everything before using it.	I may do it. I will compare with other websites.	Very possible, I can't plan to far ahead! Things deals discounts promos come and go!	I would certainly look and see what I can find and would use them.
Confident in saving, cautious about potential restrictions	I may or may not use them.	Since I've never heard of this company I don't know how I feel. But it would be something that I would be happy to look into it and see if it would save me any money.	50/50 depends on price or competitors offers

Exhibit 3c
Reflections on Skiplagged and Expedia: Illustrative Positive Verbatims
(Q14a:b)

Test	Control	Test	Control
Skiplagged Ticket (n=66)	Expedia Ticket (n=111)	Skiplagged Hidden City Ticket (n=51)	Expedia Ticket (n=105)
I will look into them for next time	Confidence that they will get me a good deal better than I could on my own from the airline.	Confident it will save me money	I will definitely buy tickets from them because they offer huge discounts
I feel as if buying an airline ticket from this platform would be a good deal.	I feel good about buying from them because I trust their service.	Most of the time, I do book with Skiplagged. It offers competitive prices	I'm excited to check them out because I would like to save money on my next flight
I will be very happy to book a travel trip with them because their service is affordable and customers centric	I feel like I would consider Expedia as a way to save money	Would be a site I would surely check out	I may consider it if it is a large enough discount.
It would be easy and cheaper	Very professional and timely responsive	I would probably buy my next ticket from them	I would buy a ticket from Expedia if it was the price I was looking for.
Might be a good idea. Price seemed reasonable.	I think this is a very efficient and convenient way to book travel and accommodations	I would use this site again.	I feel positive. I have found them to be a good source for travel.
Reflecting on the offering and what I saw in the images, I will definitely visit the skip lagged website to purchase an airline ticket	I think Expedia is doing a good job and there is lots of choice.	Safe and secure	Comparing prices through different companies and options

The results of the analysis of the open ended responses regarding getting cheaper flights (for the Non-Hidden City tickets) or not recognizing the risks of the hidden city flights for those exposed to these stimuli, are listed in Exhibit 3d. This analysis was done both for the responses to the first open ended question (Q1) as well as across all open ended questions.

Exhibit 3d
Open-ended description of offering (to a friend) – (Open Ended Coded) – Deception
Q1a/b AND all OE Questions

Based on	% of Confused Consumers			
	Test Skipplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skipplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q1a/b				
There is deception	4.8%	NA	89.6%	NA
There is not deception	95.2%	NA	0.7%	NA
Ambiguous	0%	NA	9.7%	NA
All OE Questions				
There is deception	29.5%	NA	63.2%	NA
There is not deception	69.2%	NA	27.8%	NA
Ambiguous	1.4%	NA	9.0%	NA

There is deception:

- For Non-Hidden City ONLY: Skipplagged (Expedia) is cheaper than American Airlines
- For Hidden City: Consumer doesn't understand that there are meaningful risks associated with the ticket (financial penalties, not being able to fly on airline, etc.)

There is not deception:

- **For Hidden City:** Consumers understand at least one meaningful risk (beyond needing to pack a carry on) AND think the risks are worth it

Ambiguous

- If unclear based on responses
- **For Hidden City:** If only mention less meaningful risks (can't check a bag)

3. Consumers' beliefs re Skipplagged's (Expedia) association with AA

One of the most striking findings of our study is that 41% of respondents exposed to the Skipplagged stimuli associated Skipplagged with AA, which is about the same % as those who associated Expedia (i.e., AA's legitimate/authorized agent) with AA. Even among those exposed to the Hidden City offering, 30% associated Skipplagged with AA. The detailed results based on questions 1 ,2, 4, 5 and 6 are presented in Exhibit 4.

Exhibit 4
Consumer Confusion as to the relationship between Skiplagged (or Expedia) and AA
(Q 1-6)

Based on	% of Confused Consumers			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
All OE Questions Associated or connected with airline based on open-ended responses for all questions	2.7%	3.2%	4.9%	5.8%
Q1 Associated or connected with airline based on open-ended description of offering	1.4%	0.6%	0.7%	1.9%
Q2-3 Associated or connected with airline				
Q2				
Yes	33.6%	31.6%	25.7%	33.5%
No	21.9%	21.9%	29.2%	21.3%
Don't Know	44.5%	46.5%	45.1%	45.2%
Q4-6 Require permission or authorization from an airline				
Q4				
Yes	24.0%	28.4%	13.9%	22.6%
No	34.2%	33.5%	42.4%	36.1%
Don't Know	41.8%	38.1%	43.8%	41.3%
NET (Yes for Q2 or Q4)				
Yes	41.1%	42.6%	29.9%	42.6%*

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

To get a better understanding of the respondent's perceptions of the relationship between Skiplagged and AA, we asked them two additional questions: (Q7a) whether "Skiplagged (Expedia) is the authorized agent of the airline" or not. The responses to this question and a follow up question regarding the reasons for their belief are presented in Exhibit 5. Examination of these results shows that over 40% of the respondents exposed to the two Skiplagged stimuli believed Skiplagged is an authorized agent of the airline. And an additional 14-17% believed there is some other relationship between the two. Many of the reasons for this are not surprising, which included the facts that you can buy the ticket for the airline and the way the information is presented.

Exhibit 5
The perceived relationship between Skiplagged (or Expedia) and AA
(Q 7a)

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q7a Skiplagged (Expedia) is an Authorized agent of the airline	43.2%	56.1%*	42.4%	63.9%*
Skiplagged (Expedia) is NOT an authorized agent of the airline	13.0%	14.2%	22.2%	9.0%
There is some other relationship between Skiplagged (Expedia) and the airline	17.1%	15.5%	13.9%	13.5%
Don't Know	26.7%	14.2%	21.5%	13.5%
Q7b Illustrative Reasons for believing that Skiplagged (Expedia) is an authorized agent of the airline				
	Because they have to be dealing with the airline	Because they wouldn't be able to broker me a flight then	Generally many airlines require this for the services to be sold by a third party	That's the only way Expedia will be allowed to sell airline tickets from that company
	Because I can buy a ticket	It connects with the airline so that they know that you booked a ticket to their airline.	From the name and information	It shows real time travel rates
	They obviously selling tickets for them	The airline offers a certain amount of tickets to the company at a reduced rate for the company to sell	Because you buy tickets from them	The airline is allowing Expedia to sell tickets for THEIR services provided.
	They are helping to sell flight tickets through their platform.	Because I always booked at 39xpedia agency to book any airlines	They must be authorized to sell plane tickets	I would have to believe that they would be otherwise how could they sell the ticket
	They're selling airline tickets	They connect the passenger to the actual flight and receive payments	Because their selling the airlines tickets and flights.	It has been around for a long time so it would make sense that it would be
	By how the information was listed	You can get on the airline through Expedia but have to contact Expedia if you have any problems.	Because your able to buy a airline ticket associated with the airline	There are many flights available through the Expedia website.

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

The second question regarding the relationship between Skiplagged and the airline was Q 11: whether “Skiplagged (Expedia) is an authorized travel agency with access to fares I could not access via the airline.”

The responses to this question are presented in Exhibit 6. An extremely high percent of respondents --close to 40%-- exposed to the two Skiplagged stimuli said YES. Many of the reasons for this perception is the way the material is presented.

Exhibit 6**Consumers' belief re Skiplagged (or Expedia) as an authorized agent with special access to fares that could not be accessed via the airline****(Q11a)**

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q11a Skiplagged (Expedia) is an authorized travel agency with access to fares I could not access via the airline	38.4%	52.9%*	38.9%	53.5%*
Q11a Skiplagged (Expedia) is NOT an authorized travel agency and does NOT have access to fares I could access via the airline	9.6%	7.7%	7.6%	7.7%
DK if authorized agent	23.3%	19.4%	32.6%	16.1%
DK if they have or do not have access to tickets, I could not access via the airline	28.8%	20.0%	20.8%	22.6%
Q11b Illustrative Reasons for believing Skiplagged (Expedia) is an authorized travel agency with access to fares I could not access via the airline				
	Because I could buy the ticket	It helps me book the ticket, luggage, and it gives me an option to pay more for luggage protection.	Can only book those fares through them	They sell fares for airlines so that should mean they have access to flights
	Because their service is unique to them	You can book any airlines through Expedia	Listed on a major airline website	Some deals are only listed on their site
	Because I believe they are cheaper	Airlines set aside a number of available seats to authorized travel agencies.	It seems like they offered exclusive discounts	This is the business they are in. They have certain parameters that make them more attractive.
	Those tickets were too cheap for it to be anything else.	This is what Expedia does	States it in the pictures	I know they compare prices for the best deal
	It seems they have very reasonable prices that I have not seen through the airlines directly	Expedia works to fulfill vacancies	I could not access via the airline	They are a travel company to book the entire trip from flights, hotels and car rentals
	The only way I see them being able to get that low prices		If they weren't authorized, they would be shut down.	

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Given that we had a number of questions probing the respondent's' perceived association between Skiplagged and the airlines, exhibit 6a includes a summary of these responses identifying the NET percent of respondents who believed that such association exists. The results show that an overwhelming number of respondents (73% - 76%) believe Skiplagged is affiliated with AA. This is only slightly below the belief as to Expedia (AA's actual authorized agent).

Exhibit 6a

Overall and NET perceived association between Skiplagged and the Airlines (All associated questions)

Based on	% of Confused Consumers			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
All OE Questions Associated or connected with airline based on open-ended responses for all questions	2.7%	3.2%	4.9%	5.8%
Q1-Q6 NET Associated or connected with airline based on open-ended description of offering	41.1%	42.6%	29.9%	42.6%*
Q7a Skiplagged (Expedia) is an Authorized agent of the airline	43.2%	56.1%*	42.4%	63.9%*
Q11a Skiplagged (Expedia) is an authorized travel agency with access to fares I could not access via the airline	38.4%	52.9%*	38.9%	53.5%*
NET (said yes to at least one question)	76%	81.3%	72.9%	86.5%

4. Consumers' belief re Skiplagged's deceptive messages and offers (vs. Expedia)

AA's Complaint in this case alleges that Skiplagged deceives consumers to believe that Skiplagged's regular tickets are cheaper than purchasing tickets directly from the airline, and that Skiplagged does not fully disclose to consumers the actual risks/consequences of purchasing a hidden city ticket from Skiplagged. To test these allegations, we asked the respondents who were

exposed to the Skiplagged offerings a few questions.

The first of these questions asked if “buying tickets through Skiplagged (Expedia) is cheaper than buying directly from the Airline” or not (Q8).

Not surprisingly, 62% of the respondents exposed to the first stimulus (the non-hidden city tickets) and 70% of those exposed to the second stimulus (the hidden city tickets) said YES. This is very similar to the % who said yes to this question with respect to Expedia.

Exhibit 7

Consumers' belief Re the cost of buying tickets through Skiplagged (or Expedia) vs. buying directly from the Airline
(Q8a:b)

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q8a Buying tickets through Skiplagged (Expedia) is cheaper than buying directly from the airline	61.6%	74.2%*	70.1%	65.2%
Buying tickets through Skiplagged (Expedia) is NOT cheaper than buying directly from the airline	7.5%	9.0%	8.3%	15.5%
Don't Know	30.8%	16.8%	21.5%	19.4%
Q8b Illustrative Reasons for believing that buying tickets through Skiplagged (Expedia) is cheaper than buying directly from the airline				
	Cheaper fees	Because I have used them before and if it was cheaper to book through the airline nobody would ever use Expedia.	Price decreased	Often times these third party sites offer huge discounts
	The tickets were discounted I believe	I guess they offer the list price available	Slight discount	They find the cheapest flights across all airlines
	Because they had a great price	I get to get points for every booking that I do so next time I book I get a discount.	This is indicated on the site	You can compare prices ahead of time on the website.
	I get a better deal.	It has more promotions	The price just seems low	From past experience.
	The price is very affordable and customers centric	I travel frequently and the prices shown are cheaper	They showed a discount	You can use discounts and codes for deals and promotion
	It offers discounts	It comes with rewards that could be used forthwith	Always cheaper thru a travel agent	In my experience, you get better deals by booking that way

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

A related question was whether "Skiplagged (Expedia), charges an additional fee on top of the airline total cost" (Q9).

Exhibit 8 presents the results, which show that one out of three respondents exposed to the non-hidden city stimuli said YES and one of 4 of the respondents exposed to the hidden city stimulus said YES. And both % are very similar to those of Expedia.

Exhibit 8a
Consumers' belief Re the fees charged by Skiplagged (or Expedia)
(Q9)

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q9a Skiplagged (Expedia) charges an additional fee on top of the airline total ticket cost.	35.6%	34.2%	26.4%	24.5%
Q9a Skiplagged (Expedia) does NOT charge an additional fee on top of the airline total ticket cost.	34.9%	39.4%	34.0%	44.5%*
Don't Know	29.5%	26.5%	39.6%	31.0%
Q9b Illustrative Reason for believing that Skiplagged (Expedia) does NOT charge a fee for its services				
	No additional charges was stated on their website	It rather comes with discounts and rewards	Much cheaper	Did not see an extra fee listed
	It doesn't charge	They collect a fee from the airlines	They make there money from airline	From my experience, they simply do not do this.
	I get a better value for my money when buying through this platform.	It said so	No additional cost if direct to the airline website	From past experience.
	They don't accept extra fee	I didn't see additional fee on the website	I used it before and there was no additional fee	They get a percentage of tickets sold from the airline
	The website doesn't charge extra it just charges your regular fees and how much ticket cost	I didn't see any extra fees	It was stated	No fees are listed
	It doesn't say they do	It only charged taxes on top of the ticket price so there is no additional fees.	It's what I saw within the ad itself.	Additional fees are charged by the airline

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

The perception of the reasonableness of the fees are presented in Exhibit 8b and show very little difference between the perception of Skiplagged and Expedia.

Exhibit 8b
Consumers' belief Re the fees charged by Skiplagged (or Expedia) are reasonable.
(Q10)

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q10a Believe the fee Skiplagged (Expedia) charges for its services is reasonable	52.1%	51.0%	41.7%	49.0%
Q10a Believe the fee Skiplagged (Expedia) charges for its services is NOT reasonable	8.2%	11.0%	17.4%	6.5%
N/A (I do not think Skiplagged (Expedia) charges an additional fee on top of the airline's total cost)	17.1%	19.4%	16.7%	29.0%
Don't Know	22.6%	18.7%	24.3%	15.5%
Q10b Illustrative Reasons for believing the fee Skiplagged (Expedia) charges for its services is reasonable				
	It seems fair	I feel the fee is reasonable because it would help their business out and it'll improve their services.	45.00 is a o.k. fee	There is not an uplift in the price.
	They are a middle plane of plane tickets	They just charged taxes	Other sites charge at least this fee or more.	Because it is still less than retail.
	They have to make money somehow	Not too much	they have to make some money	I don't mind paying additional if it's really worth it.
	So I can get a better deal overall.	The earliest bookings normally save customers money	They prices seemed reasonable given today's costs	Affordable prices.
	There's a detailed information about the booking process for travelers	It's a third party and there is a fee	reasonable price good for everyone	They usually have all the information you need about a trip so they offering something that is valuable
	The \$10 feed at this website charges is quite reasonable	It is a decent fee And and not too expensive	The price that's offered	I've booked with Expedia before and I think the rates are the same or very close with er way.

The following exhibits present the respondents' perceived legitimacy and risk of the Skiplagged offerings.

Exhibit 9a presents the results to the question of whether “a ticket bought through Skiplagged (Expedia) is a valid ticket.” Over 70% of the respondents to Skiplagged stimuli said YES. Very close to the around 90% who said so for Expedia. The exhibit also includes some illustrative quotes; for more detailed verbatim, see Appendix C-6.

Exhibit 9a
Consumers' beliefs Re the legitimacy and risks Skiplagged Hidden City offerings
(Q12)

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Q12a A ticket bought through Skiplagged (Expedia) is a valid ticket	74.0%	87.7%*	70.1%	90.3%*
Q12a A ticket bought through Skiplagged (Expedia) is NOT a valid ticket	4.1%	4.5%	5.6%	1.3%
Don't Know	21.9%	7.7%	24.3%	8.4%
12b Illustrative Reasons for believing A ticket bought through Skiplagged (Expedia) is a valid ticket				
	Because they would not sell fake tickets	It's a valid ticket because it's connected to the airline.	I real website	I've flown with them
	They're authorized	Because no one would use it otherwise	why would they be able to sell invalid tickets?	Expedia is a great company
	Because it said so	Because they are recognized and authorized	They are offering tickets to flights	It's from the airline Expedia is a third party company.
	Why else would they be in business	Once the ticket is sold and paid for the airline has to honor the ticket.	It seems like a valid ticket	people have used it for travel
	It has to be	I have used Expedia before	I'm just assuming that I legit website.	I've bought tickets from them
	I think it's a trustworthy platform.	It's a trustworthy booking site	Authorized travel agent, I think.	It has to be valid.

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Exhibit 9b presents the results to the question of whether “the option offered by Skiplagged (Expedia) carries no risk.” Over a third of all respondents to both Skiplagged stimuli said YES.

This is significantly lower than the perceived risk of Expedia, but still a very high percentage, and especially with respect to the numerous risks of the hidden city offering.

Exhibit 9b
Consumers' beliefs Re the Risks of Skiplagged
(Q12)

Based on	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
12c The option offered by Skiplagged (Expedia) carries no risk	37.0%	59.4%*	36.1%	55.5%*
12c The option offered by Skiplagged (Expedia) carries risk	14.4%	14.8%	28.5%	18.1%
Don't Know	48.6%	25.8%	35.4%	26.5%
12d Illustrative Reasons for believing the option offered by Skiplagged (Expedia) carries no risk				
	there is no risk	It doesn't carry risks if you pay more to keep your information secured and luggage safe.	It's a guaranteed fare	I have never had an issue with my ticket purchase or my flights
	Did not see any risk factors	As long as you book a ticket with a refundable one it's o k	why would they sell invalid tickets	They are a well known company
	It's a trustworthy platform.	It's a trustworthy brand	There is no risk	It is as good as a ticket purchased directly from the carrier.
	None was provided on their website	I don't see how there would be a risk involved.	One price one flight ticket	It is licensed.
	I believe the offerings that this website has carries little to no risk as with the other sites that offer the same service	If it is authorized I don't think it is a problem	It's a guaranteed money back. It's a failsafe service.	I do not know of any risk involved
	They must do what they said of not I fraud	I've done it before	Everything is clearly explained	They are guaranteed

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

The next two exhibits focus on the perceived risks of buying Skiplagged (Expedia) tickets.

Exhibit 10a categorized the open ended responses to the question “what are the risks associated with this ticket” and a follow up probe. (Q12e: f). The risks were categorized into three

categories: meaningful risks, unmeaningful risks, and no risk. The definition and examples are listed underneath the below exhibit. Examination of the results show that the vast majority of the respondents perceived no risk, and only 4% of the respondents who saw the Skiplagged first stimulus and 17% of those who saw the second stimulus perceived a meaningful risk.

Exhibit 10a
Consumers' perceptions of the risks involved in buying Skiplagged (or Expedia) tickets

Consumers perceived risks (Q12e-f):	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Meaningful Risks	4.1%	11%	16.7%	11.0%
Unmeaningful Risks	8.9%	7.7%	12.5%	7.1%
No Risk	89.0%	87.1%	74.3%	85.2%*

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Meaningful Risks:

Includes the following risks:

- Financial penalties
- Can't fly on airline/Can get banned/Makes airline angry
- Cancellation problems/schedule changes
- Ticket isn't valid/ticket may not be honored
- Refund issues
- Fraud/scam issues
- Changes in plans
- Delays
- 'Third party' risk
- Weather risk
- No seats/plane is full
- Other Meaningful risks

Examples:

- Maybe the airline will be angry and kick you off the plane
- Unknown extra fees at the airline, change fees, chance they are a scam website, cancellation fees.
- Not being validated or if it is canceled

Unmeaningful Risks:

Includes the following:

- Can't check a bag
- Unidentified Risks

Examples:

- Everything has risk
- Lost items
- Every ticket purchase carries risk. You can buy all the insurance in the world, have all the assurances in the world, and all the guarantees in the world, but stuff still happens.

Exhibit 10b presents the number of meaningful risks identified by the respondents.

Examination of the results show that, despite the numerous risks associated with the Hidden City tickets, the vast majority of the respondents do not perceive any meaningful risks, 11% perceive only one meaningful risk, and hardly anyone mentioned 2 or more meaningful risks.

Exhibit 10b

Number of meaningful risks identified by each respondent.

Consumers perceived risks (Q12e-f):	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Mean	0.08	0.14	0.23	0.17
Median	0	0	0	0
0 (No Meaningful Risk Mentioned)	95.9%*	89.0%	83.3%	89%
1	1.4%	8.4%*	11.1%*	5.8%
2	2.1%	2.6%	4.9%	3.9%
3	0.7%	0%	0.7%	1.3%
4+	0%	0%	0%	0%

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

5. Consumers' reactions to knowing the facts about the AA offer and the actual risks of the Hidden city offer.

The last part of the questionnaire focused on the respondent's reaction to knowing the truth about how Skiplagged's offering compared to the same offering on AA.com, and, for the respondents who saw the Skiplagged hidden city stimulus, the risks associated with this offer.

Exhibit 11a presents the results of the open-ended responses to the question "Comparing the results you got from Skiplagged (Expedia) and from American Airlines websites, how do you feel about the Skiplagged (Expedia) offering?" (Q15a: b). Surprisingly, only 20% of the Skiplagged respondents who saw the first stimulus and 25% of those who saw the second stimulus had negative sentiment toward Skiplagged. And a very large segment still had positive sentiment toward Skiplagged – 50% among those who saw the first stimulus and 43% among those who saw the second stimulus.

The following three Exhibits – 11b, c and d, presents illustrative quotes for the negative, neutral, and positive reactions.

Exhibit 11a

**Given additional information about American Airlines,
how do consumers feel about the Skiplagged (or Expedia) offer (Q15a:b)**

Consumer Feelings about the Skiplagged (Expedia) offer (Q15a +b):	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Negative Sentiment about Skiplagged (Expedia)	19.2%*	5.8%	25%*	5.8%
Neutral Sentiment about Skiplagged (Expedia)	11.6%	25.8%	12.5%	23.9%
Positive Sentiment about Skiplagged (Expedia)	50%	47.7%	43.1%	52.3%
Don't Know	18.5%	20%	19.4%	18.1%

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Exhibit 11b
Reflections on Skiplagged and Expedia: Illustrative Negative Verbatims
(Q15a:b)

Test	Control	Test	Control
Skiplagged Ticket (n=28)	Expedia Ticket (n=9)	Skiplagged Hidden City Ticket (n=36)	Expedia Ticket (n=9)
I feel like they're ripping people off	Is that the total price or is n the next screen adds fees? If it is the same price why not go through the airline instead?	not sure worth it since I normally have luggage to check and want my frequent flyer miles	Not a big enough discount.
They are charging more than booking directly with the airline.	I feel it might be a scam because they're the same	I think it's risky	Since it is the same, I would book directly through the airline
I prefer to order tickets from a site I am familiar with.	it was more expensive and less secure than just buying from the airline	It seems like there are risks	It cost too much
There isn't a huge difference that I would deem it creditable to use this site. Play it safe and buy from the airlines directly.	American Airlines just looks more setup then Expedia does	sounds like they are using exploitative practices.	I would just use the American airlines website
It is \$10 more because of service charge so why book it	Not great. it's the exact same, so there's no incentive to chose them over the aurline	American airlines website is more accurate than skiplagged	American Airlines is cheaper by about \$35
It is expensive and has several charges	The Expedia offering did not charge significantly more at all.	Wow. I wasn't aware of the airline restrictions. Maybe that's not the best way to buy a ticket.	Is more expensiv

Exhibit 11c
Reflections on Skiplagged and Expedia: Illustrative Neutral Verbatims
(Q14a:b)

Test	Control	Test	Control
Skiplagged Ticket (n=17)	Expedia Ticket (n=13)	Skiplagged Hidden City Ticket (n=18)	Expedia Ticket (n=35)
Same offering as the airline	The same flight same price	Cheaper but not clearer	They are the same prices
It is reasonable, but I would then book directly through the airline	Not bad. The difference is in incentives	It really just depends on the situation	It's essentially the same
Same as other booking sites	The offers are the same	I feel like it is cheaper, but it violates the airline policy so there is a risk.	It looked similar, so not sure why I would use it
I'd feel comfortable buying a ticket from this agency it looks professional and just like other websites	About the same	I feel like it's almost identical	The same flights
It looks like any other travel website I've used before.	It looks almost exactly the same, I would feel like Expedia is just offering the same thing I see with American	I think they offer more but I'm just not sure if I still trust it	It's literally the same exact thing
Is a great offer if not the same	It is basically the same price	I'm not sure now if it's okay or not	I think it was pretty much the same

Exhibit 11d
Reflections on Skiplagged and Expedia: Illustrative Positive Verbatims
(Q14a:b)

Test	Control	Test	Control
Skiplagged Ticket (n=73)	Expedia Ticket (n=74)	Skiplagged Hidden City Ticket (n=62)	Expedia Ticket (n=81)
I think it is a good value	Expedia gets you good deals.	Much better fee	I think the Expedia offering saves me and more of their customers money than the other offering
Seems like a decent deal	I feel Expedia offers better options than just the airline itself.	The Skiplagged is better	It sounds very reasonable
It is way more cheape	It seems like a better deal	Love it, seems to be a smart way to hack the system	It is favorable and credible.
I feel as if I am getting a better value for my money.	It's cheaper and affordable	They offer more protection plans as to your flight.	Feel as though the price is great and better.
It's cheaper	This is a good offering	It's a more affordable option	Expedia is less and easier to navigate.
I will be very happy to book a travel trip with them because their service is affordable and customers centric	They are offering a very good price for the flight with options.	It feels like they are less intimidating and more open and reliable	Good, price is about the same

Exhibit 12 asks the respondents about their intentions to buy their next ticket from

Skiplagged (Expedia). And this is after being exposed to the facts about the AA offer, and, for respondents who saw the Hidden City offering, after finding out about the risks of the offer.

Surprisingly, almost half of the respondents still definitely or probably would buy the tickets from Skiplagged.

Exhibit 12
Consumers' intention to buy their next airline ticket from Skiplagged (or Expedia)
(Q16a)

Consumer Reaction:	% of Respondents			
	Test Skiplagged Ticket (n=146)	Control Expedia Ticket (n=155)	Test Skiplagged Hidden City Ticket (n=144)	Control Expedia Ticket (n=155)
Bottom Two (Definitely would not/Probably would not)	19.9%*	7.7%	19.4%*	2.6%
Top Two (Probably would/Definitely would)	53.4%	77.4%*	47.2%	73.5%*
1. Definitely would not consider buying my next airline ticket from Skiplagged (Expedia)	8.9%	3.2%	6.9%	0.6%
2. Probably would not consider buying my next airline ticket from Skiplagged (Expedia)	11.0%	4.5%	12.5%	1.9%
3. May or may not consider buying my next airline ticket from Skiplagged (Expedia)	21.9%	14.8%	29.2%	21.9%
4. Probably would consider buying my next airline ticket from Skiplagged (Expedia)	26.7%	25.2%	19.4%	34.2%
5. Definitely would consider buying my next airline ticket from Skiplagged (Expedia)	26.7%	52.3%	27.8%	39.4%
Don't Know	4.8%	0.0%	4.2%	1.9%

* = Significantly higher than other cell at the 90% confidence level; Stat testing was only done within study

Exhibit 13 presents illustrative reasons for the various intentions to buy responses. For a more complete review of the reasons given by the respondents, see the full verbatim in Appendix C6.

Exhibit 13**Illustrative Reasons for consumers' intention to buy their next ticket from Skiplagged (or Expedia) (Q16a+c)**

Intend to buy (4+5)	
Skiplagged Ticket (n=78)	Skiplagged Hidden City Ticket (n=54)
I'll get a better value for my money.	It is a cheaper way to fly.
Seemed professional and prices are relatively good.	Seems like they offer good deals and offers
I would consider it because it seems like a reliable option.	It seems interesting and I learned something new about traveling. Almost like a hack of sorts
Based on what I saw no reason to doubt it	They offer really good deal. This is something that would fit in a line with my schedule on some good places that I need to go. I don't mind having to layover if it'll save me almost \$200.

Intent not to buy (1+2)	
Skiplagged Ticket (n=29)	Skiplagged Hidden City Ticket (n=28)
There isn't a huge difference in price that I would risk this not being a valid offer.	Its too risky
If it has same ticket but more because of service charges I see no reason to use it	You could lose your right to fly
There are too many risks involved.	Cause I want to make sure the ticket is real
Because it was hard to get a refund.	They don't comply with AA rules.

May or may not intend to buy (3)	
Skiplagged Ticket (n=32)	Skiplagged Hidden City Ticket (n=42)
Depending if the offer is cheaper than airlines	Not sure if worth the risks now that I understand the offer better
Because it gave the same results as the airline gave me but without protection	Don't know if i want the trouble
It is new to me, so I want to research and see how users feel about it.	I'm not sure I would want to take the risk
Depending if my deal is better on skiplagged I'd chose that instead	Because I'm still interested but need more research

Don't Know	
Skiplagged Ticket (n=7)	Skiplagged Hidden City Ticket (n=6)
I need more information about them and to read their reviews.	It really depends on the total price
I'll have to read more reviews	

B. Other Data supporting the Experimental Findings

In this section, we will briefly review 4 sets of data, which individually and collectively support the findings of our experiments.

1. Illustrative actual confusion and perceived deception in consumer complaints to AA

The following two exhibits present illustrative cases of actual confusion as evident from an analysis of consumer complaints to AA.

Exhibit 14 presents illustrative complaints to AA evidencing confusion as to association between Skiplagged and AA.

Exhibit 15 presents illustrative complaints to AA evidencing Skiplagged deceptive practices.

3. Illustrative actual confusion and perceived deception in consumer posts on social media

Since actual complaints are often believed to be the “tip of the iceberg” given that most consumers are reluctant to complain, we also engaged in the analysis of consumer conversations on social networks. The results of this analysis are included in Exhibit 18.

The exhibit is divided into the following parts:

- Believing that Skiplagged is an agent of AA or another airline.
- Luggage sent to the wrong destination.
- Dishonored tickets/had to pay extra.
- The cost was higher than expected.
- Passport issues
- General dissatisfaction

Exhibit 18 includes illustrations posted on social media.

Exhibit 18
Consumer Comments on Skiplagged

Believing Skiplagged is an Agent of AA or Another Airline

1. "Wow accidentally booked my flight thru Skiplagged instead of American and now I can't check my bag

Author: @laurenash_213

Date: 2018-04-14

URL: http://twitter.com/laurenash_213/statuses/984976293966917633

American Airlines Reference: N

6. “@KhadiDon download the skipagged app, all flights are cheaper an yes it's legit”

Source: Twitter

Author: @Niall_JayDub

Date: 2015-10-14

URL: http://twitter.com/Niall_JayDub/statuses/654162040479686656

American Airlines Reference: N

Luggage Sent to the Wrong Destination

1. “@SteveSasman @AmericanAir @Skiplagged Lol. You had to bring me back to PHX because AA shipped my bag to and from Vegas, which was within their rights but still sucked.”

Source: Twitter

Author: @ChrisStrub

Date: 2020-09-01

URL: <http://twitter.com/ChrisStrub/statuses/1300919283086696456>

American Airlines Reference: Y

2. “@Skiplagged You all give good deals but keeping up w/ luggage is not good on skiplagged behalf! Traveling partial flights & bags going to the final destination is terrible”

Source: Twitter

Author: @jerlbrown

Date: 2024-01-29

URL: <http://twitter.com/jerlbrown/statuses/1752017421186089335>

American Airlines Reference: N

3. “@xtatiana_ @Yaardiegurl @Pharaoh_Wilder @KateDaughtry @darnyb @EagleEye1906 Skiplagged will have your luggage going to Timbuktu but oh well you got the tkt for cheap

Author: @YeaImTORI

Date: 2020-11-02

URL: <http://twitter.com/YeaImTORI/statuses/1323245232444551168>

American Airlines Reference: N

6. “Throwaway for obvious reasons. I fcked up and trusted someone to book our tickets. They used skipplagged and now 3 of us has luggages that needed to be checked in. I trusted this "friend" because they said they knew of a way to get cheaper tickets and kept us in the dark about its details. We missed the flight and now our luggage is being shipped to another damn state that's not our supposed destination. I am annoyed and is currently frantically looking for a way to get it back. Should I just take the flight or can I have the airline ship it back? And fr, should i drop this friend lol. Dont use skip lagged people, esp when you're like me. Late and manipulated into this mess.”

Source: Reddit

Author: Flippedmacaronisalad

Date: 2023-10-01

URL: https://www.reddit.com/r/travel/comments/16wupkp/fukd_up_by_using_skip_lag/

American Airlines Reference: N

7. “Used @Skipplagged and they made me check my bag. See my luggage in a week or so..”

Source: Twitter

Author: @Koridarnell

Date: 2016-06-05

URL: <http://twitter.com/Koridarnell/statuses/739459507491737601>

American Airlines Reference: N

Dishonored Ticket/Had to Pay Extra

1. “@Skiplagged used @AmericanAir to book a flight I found & AA refused to let me carryon when I mentioned ur app & made me pay for a new flight”

Source: Twitter

Author: @nicolebrajer

Date: 2017-01-20

URL: <http://twitter.com/nicolebrajer/statuses/822303955908628484>

American Airlines Reference: Y

2. “@Skiplagged My son just purchased his first airfare using skiplagged, Tuscan to LA. American Airlines made him purchase a new ticket to board! \$172 on top of what he spent on app. Can he get a refund? This is effed up!”

Source: Twitter

Author: @itwitt2

Date: 2021-08-18

URL: <http://twitter.com/itwitt2/statuses/1428113256477073410>

American Airlines Reference: Y

3. “@Ieshialot Just stay away from Skiplagged if you’re booking american, security was about to come get me in Philly if I didn’t rebook

I don't have a ticket today.”

Source: Twitter

Author: @_____de

Date: 2021-01-24

URL: http://twitter.com/_de/statuses/1353408328173555713

American Airlines Reference: Y

6. “A word of caution on Skiplagged - use it too often and American will catch on and start pulling bullshit. I've been denied boarding to a flight, at the gate in terminal C, after checking in!”

Source: Reddit

Author: iHrtbeer

Date: 2022-12-09

URL:

https://www.reddit.com/r/Charlotte/comments/zgwq3j/how_do_you_save_money_flying_with_clt_being_so/izj0exh/

American Airlines Reference: Y

7. “@AmericanAir @Skiplagged the carryon clearly fits. I have carried it on multiple AA flights. AA forced me to pay for a new flight #skiplagged <https://t.co/uN1sK2UgV8>”

Source: Twitter

Author: @nicolebrajer

Date: 2017-01-20

URL: <http://twitter.com/nicolebrajer/statuses/822347673030098944>

American Airlines Reference: Y

8. “@_StayFit101 So basically AA considers this to be cheating the system. Skiplagged gets you lower rates by booking your flight as connecting and you get off at the layover. That's what I did, my ticket got flagged. When I got to the airport I had to pay an additional \$150 & bumped to standby.”

Source: Twitter

Author: @dorianjanelle

Date: 2022-05-08

URL: <http://twitter.com/dorianjanelle/statuses/1523387295906566145>

American Airlines Reference: Y

9. “Hi everyone, I read the FAQ but have a question regarding getting fines/banned for life from American. I bought a skiplagged flight from DTW to FLL - with a connection in CLT (my intended destination). I tried to check in, but the gate attendant told me they knew CLT was my final destination and if I did not pay the change fee & did not get on my flight to FLL, I would be banned from American for life. Has anyone had experience with this? I know not to check bags etc, and have taken 50+ flights with skiplagged & have never had an issue. Thanks”

Source: Reddit

Author: @laith-the-arab

Date: 2022-02-06

URL: https://www.reddit.com/r/Flights/comments/sm97ni/change_fees_on_skiplagged/

American Airlines Reference: Y

10. “@AmericanAir @Skiplagged as a member of @NBCUniversal, a frequent flyer, I was shocked I was forced off the line & to pay for a new flight!”

Source: Twitter

Author: @nicolebrajer

Date: 2017-01-20

URL: <http://twitter.com/nicolebrajer/statuses/822344867619557376>

American Airlines Reference: Y

11. “@AmericanAir @Skiplagged AA has the worst customer service in our nation! AA CLAIMS THIS BAG ISN'T A CARRYON! Forced me to buy a new flight. <https://t.co/JrTRVaQ8rj>”

Source: Twitter

Author: @nicolebrajer

Date: 2017-01-20

URL: <http://twitter.com/nicolebrajer/statuses/822357723127762944>

American Airlines Reference: Y

12. “@AmericanAir @Skiplagged u let ppl pass w me their carryons but BC I booked thru #skiplagged AA gave me no option than 2 pay 4 a new flight! <https://t.co/ySRBcY6wRD>”

Source: Twitter

Author: @nicolebrajer

Date: 2017-01-20

URL: <http://twitter.com/nicolebrajer/statuses/822349705979916289>

American Airlines Reference: Y

13. “@DiskullOfficial @Skiplagged @AnthonyAttia24 Do not recommend skiplagging on the way back. Got flagged coming back from New York with @Megamarv97. American made us pay the flight in full since they knew we fly out of Charlotte and weren't getting on the connecting flight

Source: Twitter

Author: @Hozay_Guap

Date: 2022-12-20

URL: http://twitter.com/Hozay_Guap/statuses/1605078826593443840

American Airlines Reference: Y

14. “@Skiplagged @AmericanAir wouldn't refund me the change fee - made me purchase a brand new flight & miss my original cus I mentioned ur app.”

Source: Twitter

Author: @nicolebrajer

Date: 2017-01-20

URL: <http://twitter.com/nicolebrajer/statuses/822307917722370051>

American Airlines Reference: Y

15. “@united @CFPB @AmericanAir @MarkWarnerVA @timkaine @Skiplagged Current attempt is a @united employee telling me it is another \$1000 I have to pay...to KEEP MY SAME FLIGHT.”

Source: Twitter

Author: @MsWZ

Date: 2017-09-18

URL: <http://twitter.com/MsWZ/statuses/909593100372324354>

American Airlines Reference: N

Cost Was Higher Than Expected

1. “@Skiplagged \$35 service fees yeah you guys are bugging I’ll just book my flight via American. SMH! Use to love u guys”

Source: Twitter

Author: @candydeepthr0at

Date: 2023-11-14

URL: <http://twitter.com/candydeepthr0at/statuses/1724359090648801288>

American Airlines Reference: Y

2. “BUYERS BEWARE! This company @ExploreTrip, found on @Skiplagged .com, will promise prices on internet and then inform you that you need to pay more money to secure your booking. They will even try to get you to pay more than the price on the airline's website #scammers #fraud <https://t.co/3L105ps7H3>”

Source: Twitter

Author: @cati4563

Date: 2019-02-03

URL: <http://twitter.com/cati4563/statuses/1092121343275999232>

American Airlines Reference: N

3. “@Skiplagged how do I contact customer service? I booked a flight, entered CC#, it was transferred to ExploreTrips who cancelled it with no notification. Now the trip is twice as expensive. #Angry”

Source: Twitter

Author: @Audiv8q

Date: 2019-10-23

URL: <http://twitter.com/Audiv8q/statuses/1187109886036865025>

American Airlines Reference: N

Passport Issues

1. “i used skiplagged (great site, highly recommend)to book a flight home to CA from Hawaii early because my original flight overlapped with school. I show up to the airport and they ask me for my passport because the flight is technically to Canada with a layover in SF (where I planned to get off). I frantically call the airline an hour before the flight and try and explain the situation and they offer to change my flight for a \$300 change fee ONTOP of the price of the new ticket. I hang up and change my story to someone stole my passport and I need to get on this flight to San Francisco where I can get a new passport and they no questions change my flight for no fees.”

Source: Reddit

Author: j-blizzle

Date: 2017-10-17

URL: https://www.reddit.com/r/AskReddit/comments/76xpa3/reddit_whats_your_top_holy_shit_that_worked_moment/dohyfu3/#

American Airlines Reference: N

2. “@Skiplagged you didn't tell me I'd need my passport to get through security for a domestic flight!! Stuck and stressed.”

Source: Twitter

Author: @StormMurphy

Date: 2016-01-11

URL: <http://twitter.com/StormMurphy/statuses/686539365661700096>

American Airlines Reference: N

3. “Usually it works great if one knows what s/he is doing, but one time was hilarious (to me). Wanted to go to PHX. Flt was \$300+. Flt from LAX to Vegas was \$48!!! with a layover conveniently in PHX. No brainer. Worked fine going. On the way back I had a flt to Seattle w a layover in LA. Mechanical issues cancelled the flt. They tell everyone they will rebook at the counter. The over accommodating agent is like “you’re in luck - there’s a direct flight to Seattle & we can upgrade you”! And it leaves in 30 minutes so you’ll arrive sooner!! Damn good customer service. What do I do?!? What can I say? “Oh no, I like layovers, inefficiency & downgrades”? I told her I had to go to the restroom- where I stayed until the flight left. Went online to book & there was a flight to BC w/ a layover in LA (not sure why it’s cheaper to go to BC from Phoenix than to LA). They wouldn’t let me board that flight b/c I didn’t have my passport. WTH? Can I have someone in LA meet me w it? No, you can’t board an international flt w no passport. But it’s going to LA 1st, which isn’t international. She said you can’t do that, but you wouldn’t want to take the chance of being stuck in LA. (Actually I would!) Ended up staying another night in PHX to catch the same PHX- LAX-Seattle flt I had originally. Even w the extra night hotel (and fun) I still saved almost \$200! And the longer version makes for a great

story. Hope they can't trace me thru this story. Crap”

Source: Reddit

Author: go4urs

Date: 2023-07-17

URL: https://www.reddit.com/r/TravelHacks/comments/152fom9/my_hilarious_to_me_skiplagged_story/

American Airlines Reference: N

4. “I fucked myself over last week I used @Skiplagged and didn't have my passport smh I didn't land at my destination had to purchase a new one way that shit sucked”

Source: Twitter

Author: @Itz_RicanSteph

Date: 2018-10-02

URL: http://twitter.com/Itz_RicanSteph/statuses/1046939729013497856

American Airlines Reference: N

5. “@Skiplagged ...Really messed me and my kids vacation return UP. Our return flights... Needed PASSPORTS from Hawaii. Had to buy NEW full fare tickets! <https://t.co/LzF3E6auhz>”

Source: Twitter

Author: @TamekaRaymond

Date: 2018-01-08

URL: <http://twitter.com/TamekaRaymond/statuses/950464317270343680>

American Airlines Reference: N

6. “If you ever use Skiplagged, please don't be like me and forget your passport by not thinking about the fact that you purchased an international flight since you just plan on getting off at a domestic layover

American Airlines Reference: N

8. “I was flying through SFO about a week ago at this point and I booked a flight to Seattle as a hidden city flight connecting to Calgary. I didn't have my passport, but I was effectively only taking the flight to Seattle. An attendant sent me to special services desk saying there was a way for me to get on the initial flight, knowing I had used Skiplagged. The Delta attendant at the services desk, seeing my issue, was adamant about it being impossible for me to get on the flight. He then began lecturing me about how I was a hipster and how I couldn't "cheat the system" among other things. He included that it was possible to get me booked just for the Seattle flight, but simply wouldn't. Due to the circumstances, I needed to book an emergency second flight to Seattle. Is there anything I can do about this? Can an airline decline service because of how I booked my flight?”

Source: Reddit

Author: KindaCompostable

Date: 2017-06-10

URL: https://www.reddit.com/r/legaladvice/comments/6geakw/wa_i_wasnt_allowed_on_a_flight_because_i_used/#

American Airlines Reference: N

General Dissatisfaction

1. “@Skiplagged you guys took my money for the ticket and service fee. Now @AmericanAir says I don’t have a ticket today”

Source: Twitter

Author: @_____de

Date: 2021-01-24

URL: http://twitter.com/_de/statuses/1353408328173555713

American Airlines Reference: Y

2. “Am I being punked @AmericanAir @Skiplagged This is a deceitful way to sell tickets and take people's money! #shameful #fraud #AmericanAirlines #skiplagged”

Source: Twitter

Author: @JessyDiva59

Date: 2021-09-26

URL: <http://twitter.com/JessyDiva59/statuses/1441930656670523393>

American Airlines Reference: Y

3. “@Skiplagged @AmericanAir absolutely horrible misleading and deceptive services. Want a direct flight to #WashingtonDC - then sell me a cheap ticket going all the way to #Richmond - where I can't have a carry on luggage & hence needed to buy a fresh ticket altogether. Outrageous!”

Source: Twitter

Author: @Akshobh

Date: 2017-12-02

URL: <http://twitter.com/Akshobh/statuses/937040316351250433>

American Airlines Reference: Y

4. “I am so annoyed with @AmericanAir & @Skiplagged someone needs to produce my voucher, apply a credit or give me my money back TODAY INSTANTLY!!”

Source: Twitter

Author: @kushmie

Date: 2020-08-17

URL: <http://twitter.com/kushmie/statuses/1295374798873219072>

American Airlines Reference: Y

5. “Hey, just some more info — this exact thing happened to me. Traveling for work. Boss booked a Skiplagged from CMH->CLT(home airport)->LGA. The app would not let me get my boarding pass. See ticket agent. Agent informs me that because I have an NC ID, they believe it is not my intention to actually fly to LGA. I told him he can believe whatever he wants and that I would

like my ticket. He, having no recourse, did print my ticket. Flight to LGA ended up being delayed a couple hours (oh nooo), so I ended up leaving CLT with no issues. I have never used Skiplagged for American because of this. Not worth the risk. But they really did flag me because of my ID.”

Source: Reddit

Author: @Castalyca

Date: 2023-07-11

URL: https://www.reddit.com/r/americanairlines/comments/l4wr746/teenager_taken_to_security_room_and_interrogated/jrv6mu/

American Airlines Reference: Y

6. “Hey guys I was wondering if anyone who is familiar with Skiplagged can help me understand this. This is my first time using Skiplagged and I am not much of a traveler. I live in NYC. I am planning a week trip in Cancun followed by a couple of days in Miami. Three flights in all. JFK to Cancun (American Airlines), Cancun to Miami (JetBlue), then Miami to JFK (also JetBlue). However, I am now seeing that my credit card was charged for these random flights in Tulsa Oklahoma and Salt Lake City Utah?? I immediately suspected fraud, but interestingly enough, the charges are for the **same exact prices** as my vacation flights. I did some research on how Skiplagged works and apparently the website shows you hidden city flights. I didn't understand this before - so now I am wondering if I happened to unknowingly book a hidden city flight from Tulsa >>> NYC >>> Cancun or something, and am now being charged the full price by the airlines? I have no idea what's going on. Or is this just fraud? Was my info somehow hacked and now someone is buying tickets from my card? Who would I go to to resolve this issue? The airlines or skiplagged? Or my credit card company for fraud? I've seen articles about Airlines banning or suing customers for booking through skiplagged, and I don't want to get in any trouble. Please help me understand this so I know how to explain my situation when I talk to a representative from an airline.”

Source: Reddit

Author: @mykashu

Date: 2021-05-07

URL: https://www.reddit.com/r/travel/comments/n759ar/i_used_skiplagged_to_book_a_trip_are_these/

American Airline Reference: Y

7. “I just want to cancel my flight @Skiplagged & @AmericanAir giving me the hardest time ever then I have @Allianz insurance on this flight and it's a complete waste of money not helpful at all I'm so over all of these companies completely disgusted!!!”

Source: Twitter

Author: @KassidyBankss

Date: 2021-06-07

URL: <http://twitter.com/KassidyBankss/statuses/1402011904055332870>

American Airlines Reference: Y

8. “don’t ever use @Skiplagged , they had me stranded in Aruba! Been otp for 6+ hours trying to reach @AmericanAir & @priceline , yall got me alllllll the way eff’d up!!!!!!!!!!”

Source: Twitter

Author: @notgnerahk

Date: 2021-06-14

URL: <http://twitter.com/notgnerahk/statuses/1404292375971774464>

American Airlines Reference: Y

9. “DON’T buy a connecting flight for American Airlines through Skiplagged

12. “@Skiplagged terrible, I’m so disappointed about your service”

Source: Twitter

Author: @eliasferreirah

Date: 2020-12-26

URL: <http://twitter.com/eliasferreirah/statuses/1342933144983511041>

American Airlines Reference: N

13. “I really may never use @skiplagged again. Girlfriend and I paid for the upgraded seats on our @united flights over a month ago and had our seats changed with no notification or refund. Customer support has been terrible to deal with. Over 7 hours of waiting total... no response”

Source: Twitter

Author: @ThatMFerr

Date: 2021-06-08

URL: <http://twitter.com/ThatMFerr/statuses/1402222251282468866>

American Airlines Reference: N

14. “@Skiplagged this flight is really important, and to be totally duped by your service/app is terrible”

Source: Twitter

Author: @CaelinCX

Date: 2018-09-15

URL: <http://twitter.com/CaelinCX/statuses/1040782338869927937>

American Airlines Reference: N

15. “@Skiplagged you guys really need to stop lying to your users and saying this as false hope. you’ve been saying the price might go down for 10 days and it’s just been shooting up ever since. terrible feature that cost me hundreds <https://t.co/9UiD4GrDdV>”

Source: Twitter

Author: @SwallowMeHole

Date: 2021-06-17

URL: <http://twitter.com/SwallowMeHole/statuses/1405458169082650631>

American Airlines Reference: N

16. “@Skiplagged Urgently seeking help, reached out this morning re: a reservation, no response. I trusted your 24-hour cancellation guarantee +My initial purchase was based on trust in ur policies. Now, with my money taken and policies not upheld, it's a terrible customer journey.”

Source: Twitter

Author: @heidifamilia

Date: 2023-11-18

URL: <http://twitter.com/heidifamilia/statuses/1725669070425522550>

American Airlines Reference: N

17. “For me it was skyscanner until last year, it really got terrible. Skiplagged turned terrible too, secret flying? Terrible”

Source: Reddit

Author: yerry_Sanchez

Date: 2023-03-30

URL: https://www.reddit.com/r/TravelHacks/comments/l268g6t/what_are_the_best_and_most_well_hidden_secrets_to/je8a3uu/

American Airlines Reference: N

18. “@Skiplagged Lina #72 was whack. Unhelpful and left me on hold for several minutes at a time. I’m disappointed you couldn’t refund the difference of my flight. Regret sharing u to friends.

21. “Almost had a situation with my luggage because of this damn skip lagged app. I don't know that I can trust it now.”

Source: Twitter

Author: @QuoirBoy

Date: 2016-12-22

URL: <http://twitter.com/QuoirBoy/statuses/811930426335956993>

American Airlines Reference: N

22. “@Skiplagged I wanted to share my experience with @Saudi_Airlines : My luggage arrived broken Reaching your customer service department was remarkably difficult Staff seemed unwilling to acknowledge the airline's responsibility for the damage. @Saudia_Care #be_aware @RiyadhSeason @NEOM <https://t.co/QowJ9b37s2>”

Source: Twitter

Author: @A_Suray7i

Date: 2023-10-11

URL: http://twitter.com/A_Suray7i/statuses/1712179287778861412

American Airlines Reference: N

23. “Yo skiplagged really almost made me lose all my luggage lmfao Im glad ik how to talk to ppl”

Source: Twitter

Author: @prodilovechris

Date: 2019-05-04

URL: <http://twitter.com/prodilovechris/statuses/1124663991110909952>

American Airlines Reference: N

24. “@Skiplagged Extremely angry with your services right now and I will be requesting a refund. I scheduled a flight through you to leave today and somehow it was changed to July 13. Come to find out, 3 more families were in line ALSO expecting to leave today. #ripoff”

Source: Twitter

Author: @LaTori_Blair

Date: 2018-06-29

URL: http://twitter.com/LaTori_Blair/statuses/1012802242452295680

American Airlines Reference: N

4. Consumer behavior and advertising and marketing theories and findings that support the validity of our empirical findings.

When searching for cheap flights or directly for Skiplagged, the Skiplagged messages are very appealing.

Consider for example the prominent first search results sponsored by Skiplagged. “Skiplagged: the smart way to find cheap flights.” And the follow up heading “Find flights the airlines don’t want you to see,” “cheap flights to NY,” and next to it the Nerd Wallet post: “What is Skiplagged and how to use it,” with the following opening sentence: “Skiplagged is a legit way to reduce the cost of certain flights. By booking a hidden city ticket, you might be able to save hundreds of dollars.”

These and similar messages are appealing and meet the RAVES criteria for effective advertising and offering.³

- **Relevant and respectful:**

- The big cost savings make it very relevant for any consumer looking for cheap flights.

- **Actionable:**

- The convenience of a click away from getting the savings is very actionable and tempting.
- The assurance of legitimacy also makes it more actionable.

- **Valuable:**

- The big cost savings make it valuable for sophisticated consumers who weigh the cost benefits of the offer, given that Skiplagged does not disclose all the risks. The benefit of cost savings outweighs the few identified risks.
- The presentation of the tickets with the AA logo and their typical format (see the stimuli we used in our study) further increases the consumer confidence that they are dealing with a legitimate agent of AA.

- **Experiential:**

- The presentation of the offering with the AA logo and format assures the consumer an experience similar to the one they experience in dealing with AA directly or with authorized agents of AA.

³ Based on Wind and Hays, *Beyond Advertising: Creating Value Through all Customer Touchpoints*. Wiley, 2016

- **Sharable story:**

- Ther hidden city story is clever, doing something which is legal, but the airlines do not like it is intriguing and could tempt consumers to buy it and share it with others.
- And for some, the creative way of finding loopholes to get cheaper flights is appealing as well as a “David against Goliath” scheme.

Thus, based on what we know about how advertising works, the Skiplagged message and offering is clever and likely to work. While the FAQ includes a bit more information about the risks of Hidden city offering, the reality is that consumers rarely if ever read the small print.

VI. CONCLUSION

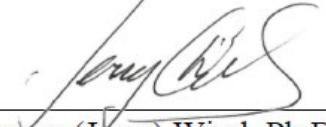
The conclusion of my analysis is:

1. The results of two consumer experiments among 600 consumers show conclusively that Skiplagged’s non-hidden city and hidden city ticket offerings deceive consumers to believe that Skiplagged is an authorized agent of or otherwise associated with American.
 - These results are clearly summarized in Exhibit 6a (p 41-42), which shows that 75% of consumers exposed to the non-hidden city ticket and 73% of the consumers exposed to the hidden city ticket believe that Skiplagged is associated with American.
 - This is just slightly below the level of perceived association between Expedia (the control groups) and American.
2. The results of the experiments clearly show that Skiplagged deceives consumers of its non-hidden city tickets to believe that purchasing a ticket on Skiplagged.com is cheaper than purchasing a ticket directly from American. In fact, 62% of the consumers exposed to the Skiplagged regular/non-hidden city stimulus believed that buying tickets through Skiplagged is cheaper than buying directly from the airline. See Exhibit 7.

- Relatedly, consumers of both the non-hidden city and hidden city tickets believed that Skiplagged does not charge an additional fee on top of the airline's total ticket costs (Exhibit 8a).

3. The results of the experiments clearly show that Skiplagged deceived consumers of its hidden city tickets to believe the following:
 - a. That a hidden city ticket bought through Skiplagged is a valid ticket – 70% of the respondents. See Exhibit 9a;
 - b. That a hidden city ticket offered by Skiplagged carries no risk – 36% of the respondents. See Exhibit 9b; and
 - c. Among those who perceived some risk, less than 17% perceived any meaningful risk (Exhibit 10a), and most of them perceived only one meaningful risk (Exhibit 10b).
4. Knowing the truth about the AA prices and the real risks associated with hidden city tickets has only limited impact on consumers' intentions to buy their next airline tickets from Skiplagged. See Exhibit 12.
5. Overall, consumers perceived Skiplagged quite similarly to their perceptions of Expedia, the legitimate and *authorized* travel agent of American that served as our control.
6. The above findings are strongly validated by the actual complaint data received by American (Exhibits 14 and 15), the complaints received by Skiplagged demonstrating a very large number of confused consumers (Exhibits 16 and 17), and consumer conversations on social networks (Exhibit 18).
7. All of my findings are consistent with what one would expect from consumer behavior, advertising, and marketing theories and practices.
8. Given these findings Skiplagged's practices are harming both consumers and American Airlines.

Philadelphia, Pennsylvania



Yoram (Jerry) Wind, Ph.D.

Exhibit A-2

APPENDIX A

Yoram (Jerry) Wind
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Short Biography

Yoram (Jerry) Wind joined Wharton in 1967 with a doctorate from Stanford and since 2017 has been the Lauder Professor Emeritus and Professor of Marketing. Since then, he's continued his active research, publication, lecturing and advising of profit and nonprofit organizations. He founded the Wharton "Think Tank" – The SEI Center for Advanced Studies in Management and directed it for three decades. Among his many innovations at Wharton, he led the development of the Wharton Executive MBA, the Lauder Institute, the new MBA curriculum of 1990, The Wharton Fellows, Wharton School Publishing, and various research programs including The Future of Advertising. He has edited top marketing journals and published over 300 articles, manuscripts and chapters. He authored, co-authored, or edited 30 books and received the four major marketing awards: Buck Weaver, Parlin, Converse, and AMA/Irwin Distinguished Educator Award. He was inducted into the inaugural group of AMA Fellows. He was one of the original Legends in Marketing, with an 8-volume anthology published by Sage in 2014. He has consulted with over 100 companies and still testifies in intellectual property cases. He is a member of advisory boards of various companies and nonprofit organizations, including the Lauder Institute (since he founded it in 1984), American Friends of Reichman University (since its founding in 1995), QS (since 2018), and the Scientific Committee of SKEMA AI School of Business (since its founding in 2022). He is a trustee of the Philadelphia Museum of Art, the Curtis Institute of Music, and Grounds for Sculpture. He co-founded Reichman University, the first private, nonprofit university in Israel, formerly known as The Interdisciplinary Center (IDC) Herzliya, and the 2021 recipient of their Honorary Doctorate. His current research explores marketing-driven business strategy, creativity and innovation (developing a Creativity course for Coursera for all ages, professions and countries) and AI for customer engagement (editing a special issue of *MBR* on that topic). His recent books include *Transformation in Times of Crisis* (December 2020), *Can Art Resolve Conflict?* (2018), *Beyond Advertising: Creating Value Through All Customer Touchpoints* (2016) and *The Network Imperative: How to Survive and Grow in the Age of Digital Business Models* (2016). He is a 2017 inductee into the Marketing Hall of Fame, the recipient of the 2023 International Marketing Trends Conference Award (Paris), and the Co-founder of the Reimagine Education Global Competition and Conference (now in its 10th year). His latest venture is the development (with Amelia) of an AI empowered new education paradigm.

<https://marketing.wharton.upenn.edu/profile/windj/#cv>

Edited: 7/6/2023

APPENDIX A**YORAM (JERRY) WIND**

Academic Positions: Jerry Wind is The Lauder Professor Emeritus and Professor of Marketing at The Wharton School of the University of Pennsylvania. Dr. Wind joined the Wharton faculty in January 1967, upon receipt of his doctorate from Stanford University, and was granted Emeritus status in July 2017.

Program Development: Dr. Wind was the founding director of the Wharton "think tank," *The SEI Center for Advanced Studies in Management*. The Center's mission was to assure, through research and development, the quality, relevance, and impact of management research, education, and practice (1988-2018). Dr. Wind was also the founder and academic director of *The Wharton Fellows* program from 2000 to 2018. From 1983 to 1988, he was the founding director of *The Joseph H. Lauder Institute of Management and International Studies*, and from 1980 to 1983 the founding director of *The Wharton Center for International Management Studies*. Dr. Wind chaired the Wharton committees that designed *The Wharton Executive MBA Program* (1974), *the new MBA curriculum* (1991), the School's *globalization strategy* (1995-1997), and the MBA's cross-functional integration efforts (2002-04). He also started *The Wharton International Forum* (1987) and served as the chairman of its faculty council until 1998. He was instrumental in establishing the Alfred West, Jr. Learning Lab and served as a member of its first advisory board (2001-05).

Publications: Dr. Wind is one of the most cited authors in marketing. His regular contributions to professional marketing literature include over 25 books and over 300 papers, articles, and monographs encompassing the areas of marketing strategy, marketing research, new product and market development, consumer and industrial buying behavior, and global marketing. Dr. Wind's books have received wide acclaim and many have been translated into a number of languages. His forthcoming book is *Transformation in Times of Crisis* with Nitin Rakesh. His most recent books include *Can Art Aid in Resolving Conflicts* (2018) with Noam Latar and Ornata Lev-er, *Beyond Advertising* (2016), and *The Network Imperative* (2016). Dr. Wind's other publications include: *Competing in a Flat World*, with Victor and William Fung (Wharton School Publishing 2007), *The Power of Impossible Thinking: How Changing Your Mental Models Will Transform the Business of Your Life and the Life of Your Business*, with Colin Crook (Wharton School Publishing 2004), *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer* with Vijay Mahajan (Financial Times/Prentice Hall 2002), and *Driving Change* with Jeremy Main (Free Press 1998). Both *The Power of Impossible Thinking* and *Convergence Marketing* were selected by Executive Book Summaries as one of the thirty best business books of 2002 and 2004. His edited books—*The Network Challenge: Strategy, Profit and Risk in an Interlinked World* (Wharton School Publishing, June 2009), *New Product Diffusion Models* (Kluwer 2000), *Digital Marketing* (Wiley 2001), and *Marketing Research and Modeling: Progress and Prospects* (Kluwer 2004)—include the works of the leading experts on these topics.

Editorship: Dr. Wind founded *Wharton School Publishing* (Wharton's J.V. with Pearson) (2003), served as the first Wharton editor (2003-2008), and published over 60 books. He has served as editor-in-chief of the *Journal of Marketing*, on the policy boards of the *Journal of Consumer Research* and *Marketing Science*, and has been on the editorial boards of the major marketing journals. He has been a guest editor of special issues of the major marketing journals including *Marketing Science* (1996) on Empirical Generalization in Marketing (with Frank Bass), *JMR* (1978) on market segmentation and (1997) on Innovation in New Product Development and *Marketing Research* (1998) on The State of the Art in Quantitative Research.

Business Experience: Dr. Wind has served as an advisor to many Fortune 500 firms and a number of non-U.S. multinationals in the financial services, pharmaceuticals, information, and consumer packaged goods industries. His consulting focuses on both overall global corporate and business strategy and transformation as well as marketing strategy and especially the development of new businesses. He is a regular advisor to SEI and a member of their executive committee. In addition, he has served as an expert witness in various legal cases. Dr. Wind is a member of the advisory board of a number of start-ups including Decision Lens, LiquidHub, DreamTime Vision, Beyond Verbal, and others. Dr. Wind is a member of the advisory boards of Fung Retailing (HK) and a number of startups. He is a former director of IDT (HK), Enhance Financial Services Corporation, Contel Corporation, CASA and a number of entrepreneurial ventures.

Professional Activities: Dr. Wind is an active member of the major marketing and management science professional associations. He is the former Chancellor of the International Academy of Management (IAM). A former academic trustee of the Marketing Science Institute and former chairman of the College of Marketing of the Institute of Management Science. He is a member of the Board of Directors of the Marketing Accountability Standards Board. He is one of the founders of the Israeli university—*The Interdisciplinary Center Herzliya* (IDC) (1994), chairman of its academic council, and member of its academic appointment and promotion committee. He is also a member of the board of the American Friends of IDC. He is a member of

the boards of a number of Wharton's centers, including the Lauder Institute and Knowledge@Wharton; a trustee of *The Philadelphia Museum of Art*, and chairman of marketing committee. He is a co-founder of the Israeli university Reichman University (established in 1994 as the Interdisciplinary Center (IDC) Herzliya). He is also a member of the board of the American Friends of IDC. He is a member of the boards of the Lauder Institute, the Philadelphia Museum of Art (and former chairman of its marketing committee), The Curtis Institute of Music (and chairman of its marketing and communication committee), Grounds for Sculpture, and co-chair of the sculpture experience committee of Woodmere Art Museum. He is a frequent lecturer in faculty seminars and executive programs in over 50 universities worldwide, a co-founder of *Reimagine Education: Innovative Pedagogical Approaches for Higher Education* (2014), and a co-founder of the Purple Project for Democracy (2019).

Awards: Dr. Wind is the recipient of various awards, including the four major marketing awards—The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996) and the Buck Weaver Award (2007). He is the recipient of the first Faculty Impact Award given by Wharton Alumni (1993). In 1984, he was elected as member of the Attitude Research Hall of Fame and has won a number of research awards, including two Alpha Kappa Psi Foundation awards and a recent inclusion in JAR Classics issue of 18 articles that have withstood the test of time. In 2001 he was selected as one of the 10 *Grand Auteurs in Marketing* and later named as the 2003 recipient of the Elsevier Science Distinguished Scholar award of the Society for Marketing Advances. In May 2004 he was awarded an Honorary Fellow of the Decade by the Interdisciplinary Center Herzliya (Israel). In 2009, Dr. Wind was selected as one of the 10 *Legends of Marketing* and in 2014 Sage published 8 edited volumes anthologizing his various publications. In 2017, Dr. Wind was inducted into the Marketing Hall of Fame. In 2020 Dr. Wind was awarded one of the first Honorary Doctorates of Reichman University.

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APPENDIX A**1. ACADEMIC EXPERIENCE****EDUCATION**

Stanford University, Graduate School of Business. Ph.D. (Marketing), September 1964-December 1966.

Stanford University, International Center for Advancement of Management Education, Certificate in Marketing Management. September 1963-June 1964.

The Hebrew University, Jerusalem, School of Economics and Social Sciences, M.A. (Business Administration and Political Science), September 1961-June 1963; B. Soc. Sci. (Economics and Political Science), September 1958-June 1961.

UNIVERSITY POSITIONS**A. University of Pennsylvania, The Wharton School****Faculty Positions:**

The Lauder Professor Emeritus, 2017-present

The Lauder Professor, 1983-2017

Professor of Marketing, 1973-present

Associate Professor of Marketing, 1970-1973

Assistant Professor of Marketing and International Business, 1967-1970

Selected Administrative Positions:

Founding Academic Director, The Wharton Fellows program and network , 2000-2018

Founding Director, The SEI Center for Advanced Studies in Management, 1988-2018

Founding Academic Director, The Future of Advertising Program, 2008-2018

Founding Editor, Wharton School Publishing (WSP), 2003-2008

Founding Director, The Joseph H. Lauder Institute of Management and International Studies, 1983-1988

Founding Director, the 1st Title VI National Resource Center in International Management Studies, 1985-1988

Founding Director, The Wharton Center for International Management Studies, 1980-1983

Secondary Faculty Appointments:

Member of the Graduate Group in International Studies (School of Arts & Sciences), 1984-1998

Member of the OR Group, 1979-1984 and the OR affiliated faculty, 1984-1989

Senior Fellow of the Leonard Davis Institute, 1977-1980

Secondary Appointment as Professor of Management, 1981-1984

Member of the Extended Faculty of the Social Systems Sciences Dept. 1981-1986

B. Other Universities

The Interdisciplinary Center (IDC) Herzliya Israel, Co-Founder (for specific activities since 1994, see p. 75).

University of Tokyo (Japan) Co-Director of the Marunouchi Global Center (MCG) program, 2002; The First Hakuhodo Visiting Professorship, Spring 1992 and 1993.

Erasmus University (The Netherlands) The First Visiting Unilever-Erasmus Professorship, Spring 1993.

University of New South Wales (Australia) The First Visiting Hoover Foundation Professor, 1977.

University of California at Berkeley, School of Business Administration Visiting Professor, Fall 1975.

University of Tel Aviv, The Leon Recanati Graduate School of Business Administration, Visiting Senior Lecturer, September 1968-August 1969.

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Stanford University, Graduate School of Business, Research Assistant, June 1965-October 1966.

The Hebrew University Jerusalem, Teaching Assistant in the Departments of Political Science and Business Administration, September 1961-June 1963.

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2. PUBLICATIONS

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1. Rakesh, Nitin, and Jerry Wind. Transformation in Times of Crisis. Forthcoming 2020.
2. Lemelshtrich-Latar, Noam, Yoram (Jerry) Wind & Ornata Lev-er. Can Art Aid in Resolving Conflicts?: 100 Perspectives. Frame Publishers, October 2018.
3. Libert, Barry, Jerry Wind, & Megan Beck Fenley. The Network Imperative: A Playbook for Creating Unprecedented Value in the Digital Age. Harvard Business Review Press, June 2016.
4. Wind, Yoram (Jerry), and Catharine Findiesen Hays. Beyond Advertising: Creating Value Through All Customer Touchpoints. Hoboken: Wiley, February 2016.
5. Yoram Wind Legends in Marketing: Sage Publications India, 2014 – 8 volumes:
Organizational Buying Behavior, (ed) Robert Thomas
Consumer Behavior, (eds) Barbara Kahn and Robert Meyer
Product and New Product Management, (ed) Vijay Mahajan,
Marketing Strategy, (ed) David Reibstein
Market Segmentation, (ed) David Bell
Global Marketing, (ed) Arun Jain
Marketing Research and Modeling, (ed) Vithala Rao
The Future of Marketing, (ed) George Day
6. Fung, Victor K., William K. Fung and Yoram (Jerry) Wind. *Competing in a Flat World: Building Enterprises for a Borderless World. Upper Saddle River: Wharton School Publishing, 2007. [Translated editions: Bahasa Indonesia; Chinese Simplified; Chinese Traditional; English (India); Italian; Korean; Polish; Portuguese; Spanish; Italian; Bahasa Indonesian; Turkish.]
7. Wind, Jerry, Colin Crook and Robert E. Gunther. *The Power of Impossible Thinking: Transform the Business of Your Life and the Life of Your Business. Upper Saddle River: Wharton School Publishing, 2004. Selected by Executive Book Summaries as one of the thirty best business books of 2004. [Translated editions: Arabic; Bahasa Indonesia; Bulgarian; Chinese (simplified and traditional); English (Singapore); Italian; Japanese; Korean; Polish; Portuguese; Russian; Serbian; Spanish; Thai; and Turkish.] Selected by Executive Book Summaries as one of the thirty best business books of 2004; finalist in *Fast Company* Reader's Choice Award for the October book of the month; among CEO READ top 25 books of August 2004. A paperback edition was published in 2006.
8. Krieger, Abba, Paul E. Green and Jerry Wind. Adventures in Conjoint Analysis: A Practitioner's Guide to Trade-Off Modeling and Applications. Philadelphia: The Wharton School, 2004 <https://www.dropbox.com/s/85ft1hrsqr5ttxj/Adventures_in_Conjoint_Analysis_A_Practitioners_G.pdf?dl=0>.
9. Wind, Yoram (Jerry), Vijay Mahajan and Robert Gunther. *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer. Upper Saddle River: Prentice Hall, 2002. Selected by Executive Book Summaries as one of the thirty best business books of 2002. Translated editions: Chinese (simplified), Tsinghua University Press; Chinese (traditional), Prentice Hall Taiwan; Bahasa (Indonesia); Spanish; Portuguese; Italian [*Consumatore Centauro*: Orvaro il Marketing Della Convergenza, ETAS LAB. IT. 2002]; Korean; and Japanese.
10. Fields, George, Hotaka Katahira, Jerry Wind and Robert E. Gunther. Leveraging Japan: Marketing to the New Asia. San Francisco: Jossey-Bass, 1999.
11. Wind, Yoram and Jeremy Main. *Driving Change: How the Best Companies are Preparing for the 21st Century. New York: The Free Press, 1997.

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Translated editions in U.K. by Kogan (Page Ltd.), 1998; China by Shanghai Jiao (Tong University Press), 1999; Hungary by Veres István (Geomeédia Szakkönyvek), 2000. Adaptation to local condition: Brazil by Luiz Felipe Monteiro Jr. (IBMEC Qualitymark Editoria), 2002.

12. Bauer, Roy A., Emilio Collar, Victor Tang, Jerry Wind and Patrick R. Houston. The Silverlake Project: Transformation at IBM. New York: Oxford University Press, 1992.
Translated to Chinese, Huaxia Publishing, 2000.
13. Wind, Yoram. *Product Policy: Concepts, Methods and Strategies (Addison-Wesley Marketing Series). Reading: Addison-Wesley, 1982. Reviewed in the *Journal of Marketing*, Summer 1981.
14. Wind, Yoram. *Marketing and Product Planning (in Spanish). Mexico: Expansion, 1979.
This book is based in part on sections from *Product Policy* which was selected by the editors of Expansion as the "Book of the Year" 1979.
15. Wind, Yoram, Paul E. Green and Douglas Carroll. Multi-Attribute Decisions in Marketing: A Measurement Approach. Hinsdale: The Dryden Press, 1973.
16. Webster, Frederick E. and Yoram Wind. Organizational Buying Behavior (Foundations of Marketing). Englewood Cliffs: Prentice Hall, 1972.
Translated to Portuguese (Editor, Atlas, Sao Paulo, Brazil, 1975). Reviewed JMR, August 1974.
17. Wind, Yoram, Ronald E. Frank and William F. Massy. Market Segmentation (International Series in Management). Englewood Cliffs: Prentice Hall, 1972. Reviewed JMR, November 1972; August 1974.
18. Wind, Yoram, Homer Dalby and Irwin Gross. Advertising Measurement and Decision Making. Boston: Allyn & Bacon, 1968.
19. Robinson, Patrick J. and Yoram Wind. Industrial Buying and Creative Marketing. Boston: Allyn & Bacon, 1967.
Contributed two chapters; co-authored with Patrick J. Robinson three chapters; and participated in the overall organization and preparation of the book.
20. Yoram Wind. Industrial Buying Behavior: Source Loyalty in the Purchase of Industrial Components. Unpublished Ph.D. dissertation, Stanford University, 1966.

II. EDITED BOOKS

1. Wind, Yoram and Arun Jain, eds., "Paul Green Contributions to Clustering and Segmentation." Paul Green Sage Series on Legends of Marketing, 2017.
2. Wind, Yoram and Paul Kleindorfer, eds., The Network Challenge: Strategy, Profit and Risk in an Interlinked World. Wharton School Publishing, 2009.
3. Wind, Yoram (Jerry) and Paul E. Green, ed., *Marketing Research and Modeling: Progress and Prospects. Norwell: Kluwer Academic Publishers, 2004.
4. Wind, Jerry and Vijay Mahajan, ed. Digital Marketing: Global Strategies from the World's Leading Experts. New York: John Wiley & Sons, 2001.
5. Mahajan, Vijay, Eitan Muller and Yoram Wind, ed. New-Product Diffusion Models. Boston: Kluwer 2000.
6. Mahajan, Vijay and Yoram Wind, ed. Innovation Diffusion Models of New Product Acceptance. Cambridge: Ballinger Publishing Co., 1986.

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7. Wind, Yoram, Vijay Mahajan and Richard N. Cardozo, ed. New-Product Forecasting: Models and Applications. Lexington: Lexington Books, 1981.
8. Wind, Yoram and Robert J. Thomas, ed. Advances in Organizational Buying Research: The Case of Acquisition of Scientific and Technical Information. Washington, D.C: National Science Foundation, 1979.
9. Wind, Yoram and Marshall Greenberg, ed. Moving Ahead with Attitude Research: Proceedings of the Seventh Attitude Research Conference. Chicago: American Marketing Association, 1977.
10. Nicosia, Francesco M. and Yoram Wind, ed. Behavioral Models for Market Analysis: Foundations for Marketing Action. Hinsdale, IL: The Dryden Press, 1977.

III. BOOKS UNDER DEVELOPMENT

1. Eberlein, Barbara, Derek Gilman and Yoram Wind. Being Creative: Lessons from Architecture and Design
2. Yoram Wind. Challenging Our Mental Models.

IV. ARTICLES, CONTRIBUTED CHAPTERS, PAPERS IN PROCEEDINGS, AND WORKING PAPERS

The papers are grouped by the following topics:

1. Portfolio analysis and strategy
2. Marketing and business strategy
3. Marketing and product strategy
4. Research on industrial buying behavior
5. Research on consumer behavior
6. Marketing research and modeling
7. International marketing
8. International management education and the Lauder Institute
9. Management practice and education in the 21st Century
10. Convergence Marketing
11. Mental Models – Power of Impossible Thinking
12. Network-Based Strategies
13. Advertising
14. Entries in Dictionaries, Encyclopedias, and Handbooks

A. Portfolio Analysis and Strategy

1. Wind, Yoram. "Product Portfolio Analysis: A New Approach to the Product Mix Decision." Combined Proceedings. Ed. Ronald C. Curhan. Chicago: American Marketing Association, Aug. 1974. 460-464.
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- 9*. Wind, Yoram, Vijay Mahajan, and Donald J. Swire. "An Empirical Comparison of Standardized Portfolio Models." Journal of Marketing 47 (Spring 1983): 89-99. [B] Based on paper presented at the Conference on Analytical Approaches to Product and Marketing Planning, 1981 <https://www.dropbox.com/s/4j1ehwc028p18ly/8308_An_Empirical_Comparison_of_Standardized.pdf?dl=0>.
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2. Wind, Yoram. "Marketing Oriented Strategic Planning Models." Marketing Decision Models. Eds. Randall L. Schultz and Andris A. Zoltners. New York: Elsevier, North Holland, Inc., 1981. 207-250.
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3. Wind, Yoram. "Marketing and the Other Business Functions." Research in Marketing Vol. 5 (1981): 237-264.
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- 4*. Wind, Yoram. "Marketing and Corporate Strategy." The Wharton Magazine (Summer 1982): 38-45. [B] Based on Wind, Yoram. "Marketing and Corporate Strategy: Problems and Perspectives." 13th Annual Albert Wesley Frey Lecture. University of Pittsburgh. 1981.
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5. Robertson, Thomas S., and Yoram Wind. "Marketing Strategy." The Strategic Management Handbook. Ed. Kenneth J. Albert. New York: McGraw-Hill, 1983. 11-3-11-22.
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7. Wind, Yoram (Jerry). "Marketing for Top Executives: Problems and Prospects," Wharton School Working Paper, 1985.
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2. David Bell, Thin-Slicing and Retailing on the Internet
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5. Dave Reibstein, The Many Flavors of ROI
6. Eric Bradlow, The Golden Age of Marketing Research
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8. Kevin Werbach, Turn Your Customers into Players: Lessons from Gaming
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7. Bernard Lewis, Buntzie Ellis Churchill, Islam: The Religion and the People
8. Alexander B. van Putten, Ian C. MacMillan, Unlocking Opportunities for Growth: How to Profit from Uncertainty While Limiting Your Risk
9. Vijay Mahajan, Africa Rising: How 900 Million African Consumers Offer More Than You Think
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Introduction to Credit Risk and Credit Instruments

8. Jerry Porras, Stewart Emery, and Mark Thompson, *Success Built to Last: Creating a Life that Matters*
9. Philip Kotler and Nancy Lee, *Marketing in the Public Sector: A Roadmap for Improved Performance*

2005

1. Randall Billingsey, *Understanding Arbitrage: An Intuitive Approach to Financial Analysis*
2. Tony Davila, Marc Epstein, and Robert Shelton, *Making Innovation Work: How to Manage It, Measure It, and Profit from It*
3. Sunil Gupta and Donald Lehmann, *Managing Customers as Investments: The Strategic Value of Customers in the Long Run*
4. Stuart Hart, *Capitalism at the Crossroads: The Unlimited Business Opportunities in Solving the World's Most Difficult Problems* (2nd Edition, 2007)
5. Lawrence Hrebiniak, *Making Strategy Work: Leading Effective Execution and Change*
6. Jon Huntsman, *Winners Never Cheat: Everyday Values We Learned as Children (But May Have Forgotten)*
7. Eamonn Kelly, *Powerful Times: Rising to the Challenge of Our Uncertain World*
8. Doug Lennick and Fred Kiel, *Moral Intelligence: Enhancing Business Performance and Leadership Success* (Paperback, 2007)
9. V. J. Mahajan and Kamini Banga, *The 86 Percent Solution: How to Succeed in the Biggest Market Opportunity for the Next 50 Years*
10. Alfred Marcus, *Big Winners and Big Losers: The 4 Secrets of Long-Term Business Success and Failure*
11. Kenichi Ohmae, *The Next Global Stage: Challenges and Opportunities in Our Borderless World*
12. Michael Roberto, *Why Great Leaders Don't Take Yes for an Answer: Managing for Conflict and Consensus*
13. Arthur Rubinfeld and Collins Heminway, *Built for Growth: Expanding Your Business Around the Corner or Across the Globe*
14. David Sirota, Louis Mischkind, Michael Meltzer, *The Enthusiastic Employee: How Companies Profit by Giving Workers What They Want*.
15. Thomas Stallkamp, *SCORE!: A Better Way to Do Busine\$\$: Moving from Conflict to Collaboration*
16. Glen Urban, *Don't Just Relate – Advocate!: A Blueprint for Profit in the Era of Customer Power*.
17. Craig Vogel, Jonathan Cagan, and Peter Boatwright, *The Design of Things to Come: How Ordinary People Create Extraordinary Products*.

2004

1. Bernard Baumohl, *The Secrets of Economic Indicators: Hidden Clues to Future Economic Trends and Investment Opportunities* (2nd Edition, 2007)
2. Sayan Chatterjee, *Failsafe Strategies: Profit and Grow from Risks that Others Avoid*
3. Robert Mittelstaedt, *Will your Next Mistake Be Fatal? Avoiding the Chain of Mistakes that Can Destroy your Organization*
4. Mukul Pandya, Robbie Shell, Susan Warner, Sandeep Junnarkar, Jeffrey Brown (2004), *Nightly Business Report Presents Lasting Leadership: What You can Learn from the Top 25 Business People of our Time* (Paperback, 2006)
5. C.K. Prahalad, *The Fortune at the Bottom of the Pyramid* (Paperback, 2006)
6. Scott Shane, *Finding Fertile Ground*
7. Oded Shenkar, *The Chinese Century: The Rising Chinese Economy and Its Impact on the Global Economy, the Balance of Power, and your Job* (Paperback, 2006)
8. Jerry Wind and Colin Crook, *The Power of Impossible Thinking* (Paperback, 2006)

XI. ILLUSTRATIVE PUBLISHED ABSTRACTS OF PAPERS DELIVERED IN PROFESSIONAL MEETINGS

- “Enduring Vs. Situation Dependent Customer Characteristics as Bases for Market Segmentation: An Evaluation,” in David L. Sparks, (ed.), *Broadening the Concepts of Marketing*. Proceedings of the American Marketing Association, August 1970 Conference.

- "Preference of Relevant Others and Individual Choice Models," in W.L. Nichols, ed., *Proceedings of the 1974 AAPOR Conference and in Public Opinion Quarterly*, 38. Fall 1974, pp. 447.
- "Multivariate Decision-Making in the Setting of Pulmonary Outpatient Clinic," with Lawrence Spitz and Ronald Daniele. Paper presented at American College of Physicians, San Francisco, April 1975.
- "Diagnosis Consumer Behavior: A Quantitative Approach," in D. Rothwell, (ed.), *Proceedings of the 30th Annual AAPOR Conference* May 1975 and in *Public Opinion Quarterly*, 39. Fall 1975, pp. 415.
- "Segmentation and Positioning of Health Insurance Services Under Conditions of Heterogeneous Health Insurance Portfolios," in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 244.
- "Alternative Approaches to Industrial Market Segmentation," with Paul E. Green, in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 234.
- "Innovation and the R&D-Marketing Interface," with Joel Goldhar, in TIMS/ORSA Bulletin for the Atlanta Meeting, November 1977.
- "Measurement Issues in Portfolio Analysis," with Vijay Mahajan, in R.P. Leone, (ed.), *Proceedings of Market Measurement and Analysis*, TIMS, 1980, pp. 50-53.
- "Aimager Products: A Measurement Challenge," with Lew Pringle, in J. Keon, (ed.), *Market Measurement and Analysis*, TIMS/ORSA, 1981.
- "Standardized Portfolio Models: An Empirical Comparison of Business Classification," with Vijay Mahajan and Donald J. Swire in Allan D. Shocker and R. Srivastava, (eds.), *Proceedings of the 1981 Analytical Approaches to Product and Marketing Planning Conference*.

XII. CASE STUDIES

- During the academic year 1962-1963, I wrote a number of marketing cases at the Hebrew University, Jerusalem (Israel). One of these cases, The Ozi Ballpoint Pen III, was published in Harper W. Boyd, Jr. et al., (eds.), *Marketing Management: Cases from the Emerging Countries* (Reading, MA: Addison-Wesley Publishing Company), 1966.
- During the academic year 1968-1969, several marketing cases were written under my supervision at the Leon Recanati Graduate School of Business Administration, Tel Aviv University.

APPENDIX A**3. CONSULTING EXPERIENCE****I. Marketing, Business Strategy, and Marketing Research Consulting****1. Information and Telecommunication Industry**

- Telenet, Strategies for “Getting More with Less” (2006)
- Samsung, Management of Technological Innovation (2006)
- Next Level Communication: Business strategy consulting (2000)
- Motorola Broadband Sector: 1998-2004. Business Strategy consulting
- Northern Telecom: Value Pricing and Business Strategy Consulting (1993-1995)
- IBM:
 - ABS Division: Developing procedure for Integrating Marketing and R&D (1988-1989)
 - ES Division, Marketing Strategy and Segmentation (1991-1993)
- AT&T & the Bell companies: Occasional consultant to various units, including:
 - AT&T Technologies Inc. – Design a market segmentation program (1986)
 - AT&T – Review and Design of Portfolio System (1981-1982)
 - Bell Atlantic – Marketing & pricing strategy (1983)
 - Bell Canada – Design of a segmentation study and product portfolio (1979-1980)
- Xerox: Marketing consulting to a design integration program (coordinated by Jay Doblin Associates) and design of a market segmentation project (1982-1983)
- Geometric Data: Segmentation/positioning studies (1981-1982)
- Newsweek, Inc.: Marketing consulting (1979-1980)
- RCA, Government Communications Systems: Design of a research program to assess the market response to new Electronic Mail System (1978-1979)

2. Financial Services

- SEI: Marketing, Business and Corporate Strategy consulting (1986 to present)

- Edward Jones & Co.: Marketing and Business Strategy consulting (1984-2004)
- CitiBank: Statistical consulting (1980); marketing strategy consulting (1996-1997)
- E. F. Hutton: Design and implementation of a marketing planning system and various marketing research projects (1979-1984)
- Reliance Insurance Companies: Marketing research consulting (1980-1981)
- Colonial Penn Group: Design and evaluation of most of the firm’s research activities and general consulting to marketing and top management (1973-1980)
- Chase Manhattan Bank: Process for evaluation of mergers and acquisitions and design of segmentation studies (1978-1979)

3. Health Care

- Convatec: Marketing Driven Business Strategy (2008)
- Bristol-Myers Squibb (BMS): Marketing strategy consulting (1997-2002)
- Sterling Drug, Inc.: Development of marketing driven portfolio of R&D projects (1986-1991); Pricing study for innovative new product (1991-1992)
-
- Merck, Sharp, and Dome: General marketing research consulting (1981)
- Merck & Co.: Marketing Strategy and Marketing Research and Modeling (1991-1996)
- Pfizer, Inc.: 1975-1990. Design and analysis of most of the marketing research projects of Pfizer Laboratories and Roerig. Occasional marketing strategy consultant to the Hospital Products Group (1984-1986) and Pfizer Pharmaceuticals (1987-1990).
- SmithKline Beckman: Marketing strategy development for TAGAMET (1987-1988); evaluation of strategy implementation (1989)
- SmithKline Clinical Laboratories: Marketing planning (1984)

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- Upjohn: Strategic planning consulting (1981)
- West Jersey Health System: Marketing and Business Strategy (1985)

4. Transportation

- Air Canada: Market segmentation, positioning and new product development (1973)
- Chrysler: Modeling the advertising budget (1978), advising regarding the analysis of customer satisfaction process (1995-1997)
- Conrail: Design of a positioning/segmentation study (1978-1979)

5. Consumer Goods

- Mars, Advisor to the Catalyst Group (2010 – 2017)

- DAYMON: Marketing Strategy (2003-05)
- American Dairy Brands and Schreiber Foods, Inc.: Arbitration (2004)
- Campbell Soup: Advertising Strategy, 91-96, 2005-07; Taste Tests (2001-2003)
- Coors Brewing Company, Pricing and positioning (2001)
- Eastman Kodak: New product research approaches (1978)
- R.J. Reynolds Tobacco Co.: Evaluation and design of a new product development system (1979-1980)
- S.B. Thomas: Marketing and research consultant (1979-1980)
- Simplicity Patterns, Inc.: Develop a business plan (1982)
- Pepsi: Research support for the Pepsi Challenge and related campaigns (1978, 1981, 1990, 1995, 1999)

6. Industrial Products and Services

- ITT Water Technology Group (2004-2005)
- John Fluke Manufacturing Co., Inc.): Marketing and corporate strategy (1985-1988)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)
- International Harvester: Designing a market segmentation process (1980)
- Stauffer Chemicals: General marketing consulting (1980)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)

7. Retailing

- Wickes, plc: U.K. Marketing and Business Strategy Consulting (1988-1996)
- Sears Roebuck & Company: Advertising and marketing strategy (1972-1973)

8. Professional Service Firms

- Liquid Hub (2016-present)
- MS&L: Marketing consulting (1995-1997; 2001-2002)
- Price-Waterhouse Coopers LLP (marketing and corporate strategy consulting, 1996-2001).
- Standard & Poors (1997-2000)
- IMS America (1997)
- Medicus (1989-1997)
- Hakuhodo. Marketing Strategy for the 21st Century (1992-1995)
- Morgan, Lewis & Bockius: Development of Business Strategy (1992-1994)
- DMB&B (1993)
- Y & R (1989)
- Market Research Corporation of America (MRCA) (1975-1987)
- BBD&O (on an occasional basis, 1974-1985)
- Doyle Dane Bernbach: Evaluation of a campaign claim (1980)

- Cunningham and Walsh, Inc. (1978)
- Oxtoby-Smith (selected projects, 1972-1978)
- Gahagan Research Associates, Inc. (selected projects, 1972-1978)
- Professional Marketing Research, Inc. (1977-1978)
- Oxtoby-Smith (selected projects, 1972-1978)
- Applied Communication Research (1974-1976)
- National Analysts (1975-1976)
- Robinson Associates (1969-1975)
- Robinson Associates (1969-1975)
- McConnel Advertising (Montreal), (1974)
- Whittlesey and Partners (1972-1973)

9.Trading Companies, Real Estate Development

- Li & Fung: Business Strategy consulting (1998 to present)

- Dewey Companies: Marketing and Business Strategy consulting (2003)

II. Directorship

- IDT (2005-2008)
- Ecquaia (2001-04)
- Enhance Financial Services (1997 until acquisition by Radian Group, Inc. in 2001)
- Credit 2B (2001)
- CASA – Center for Adaptive Systems Applications Inc. (1999 Until acquisition by HNC in 2000)
- Access Technologies Group, co-founder and chairman (1992-1996)
- Contel Corporation, member of the Board of Directors (1988 Until acquisition by GTE in 1991)
- Reality Technologies, Inc. (1988-until acquisition by SEI Investments in 1990)
- Dover Regional Bank Shares, member of Board of Trustees (1986-1990)
- Shooting Stars, Inc., member of the Board of Directors (1986-1990)
- The Cortlandt Group, Inc., Co-founder and Chairman of the Board of Directors, (1979-1986)

III. Illustrative Advisory Boards

- DreamtimeVision.com (2016-present)
- QS World University Rankings (2009-present)
- Fung Retailing Group (2013-present)
- Journal of Advertising Research, Editorial Review Board and Senior Advisory Board (2015-present)
- Dream Time Vision (2016-present)

- Turner Ad Lab (2016-2018)
- Liquid hub (2016-2018)
- ANA Talent (2016-2018)
- Decision Lens (2005-2017)
- Insights 2020 (2015-2016)
- Arshiya (India) (2007-2013)
- Cisco Collaboration Consortium (2009-2011)
- NetXentry (WebForPhone) (2000-2011)
- Mutual Art (2003-2011)
- Ad4ever (2000-2003)

IV. Expert Witness: Marketing and Marketing Research Consulting in Legal Cases

- Alschuler, Grossman and Pines: Packard Bell vs. Compaq, 1995-1996
- Arent, Fox, Kinstler, Plotkin & Kahn: Marketing research consulting re: Estee Lauder, 1987
- Arnold, Whiite and Dunkee: The Clorox Co. vs. Dow Brands Inc. re: Smart Scrub vs. Soft Scrub,

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1995

- Arnold & Porter:
 - a) Schering vs. Pfizer, Perceived sedation of Zyrtec, 2000
 - b) Pfizer: Physicians' beliefs concerning prescription antihistamine products in terms of their sedating/non-sedating characteristics 2002
- Baker & McKenzie:
 - a) G.D. Searle & Co. and subsidiaries litigation in the U.S. Tax Court, 1982
 - b) American Republic Insurance Co. vs. Americare Inc. and American Dental Centers P.C., 1988
- Berle, Kass and Case: Evaluation of public attitude re: Burlington County Bridge Commission, 1992
- Bilzin Sumberg Attorneys at Law, Lennar Corporation vs. Michael C. Morgan, 2007
- Bingham McCutchen LLP: Sharp Computer vs. Dell Inc., 2010
- Maurice Blackburn Cashman Commercial (Australia), Biota Holdings Limited vs. GlaxoSmithKline re. Relenza, 2007-2008.
- Blanchard, Krasner & French, Consulting Re. Aerus, 2006-2007
- Brattle Group and Crowell Moring LLP
 - a) Miller Coors, LLC vs. Anheuser-Busch Company, LLC, 2019
- The Calorie Control Council vs. FTC re: the Saccharin case, 1979
- Covington & Burling LLP:
 - a) The Proprietary Association vs. FTC re: over-the-counter (antacids) drugs, 1979
 - b) FTC Staff Report on cigarette advertising investigation 1981-1983 including appearance before congressional committee in hearing on H. R. 1824: "The Comprehensive Smoking Prevention Education Act"
 - c) International Telecharge Inc. vs. AT&T, 1992-1994
 - d) Dream Team Collectibles vs. NBA Properties (re: Dream Team), 1996
 - e) G. A. Modefine S.A. vs. Armani.com, 2003-2004
 - f) Defence in Class Action Re: IBM REAP Educational Benefit, 2006-
 - g) Spirits Int Nv vs. S.S. Taris Zeytin Vezeytinyagi Birliei, Re: Moskovskaya, 2006-2008
 - h) Cunningham vs. International Business Machines Corp., 2007
 - i) QS Wholesale, Inc., vs. World Marketing, Inc., 2013
 - j) American Petroleum Institute, et al. vs. Roy A. Cooper, III, 2014
 - k) Sequoia Pacific Solar I, LLC, and Eiger Lease Co., LLC vs. The United States of America, 2016
 - l) Buckeye Tree Lodge and Sequoia Village Inn, LLC vs. Expedia, Inc; Hotels.com, L.P.; Hotels.com GP, LLC; Orbitz, LLC; Trivago GmbH; Venere Net S.R.L DBA Venere Net, LLC; Expedia Australia Investments PTY LLD, 2018-2019
 - m) Video Gaming Technologies, Inc. vs. Castle Hill Studios LLC (d/b/a Castle Hill Gaming); Castle Hill Holding LLC (d/b/a Castle Hill Gaming); Ironworks Development, LLC (d/b/a Castle Hill Gaming), 2018
 - n) The Reinalt Thomas Corporation (d/b/a Discount Tire) vs. Mavis Tire Supply LLC, 2019
- Cravath Swaine and Moore:
 - a) Amertech Corporation, et. Al. vs. Lucent Technologies Corporation [Arbitration], 1997
 - b) Louis Vuitton vs. Dooney & Bourke, Inc., 2004
- Crude Oil Resellers vs. U.S. Department of Energy Economic Regulatory Administration re: the proposed crude oil reseller price regulations, 1979, including presentation at public hearing
- Darby and Darby. Proctor & Gamble vs. Colgate, Palmolive, and Y&R re: China advertising, 1997
- Davis Polk & Wardwell LLP:
 - a) P&G and Sanofi-Aventis US vs. Hoffman-La Roche Inc and GlaxoSmithKline, Inc. Re.Boniva, 2007
 - b) Procter & Gamble Pharmaceuticals, Inc., and Sanofi-Aventis US LLC, vs. Hoffman-La Roche Inc. and Glaxosmithkline, Inc., 2006
- Dechert Price & Rhoads:
 - a) The Mutual Assurance Co. vs. American Council of Life Insurance and Health Insurance Association of America (re: The Green Tree), 1983-1984
 - b) INC vs. Manhattan, Inc., 1985
 - c) Tunis Brothers Co. vs. Ford Motor Credit Co., 1988

- d) Allerest vs. Alleract, 1988-1990
- e) Campbell Soup Co. vs. Conagra, Inc. (Various deceptive advertising cases) 1991-1996
- Department of Justice, Antitrust Division: Consulting in a number of cases since 1996, including Microsoft Network, ski resorts, Echostar's proposed acquisition of DirecTV, and dental supplies
- Dilworth, Paxson, Kalish, Levy and Kauffman: Prince Castle vs. Le-Jo Enterprises, 1977-1978
- Fish & Richardson:
 - a) Rembrandt Social Media vs. Facebook, Inc., et al, 2013
 - b) Rembrandt Social Media vs. Facebook, Inc., et al, 2014
- Fitzpatrick, Cella, Harper & Scinto:
 - a) The Gap, Inc. and Gap (Apparel) LLC vs. G.A.P. Adventures, Inc., 2010
 - b) American Beverage Corporation and Pouch Pac Innovations, LLC vs. DiAgeo North America, Inc., and DiAgeo Americas Supply, Inc. t/d/b/a Captain Morgan Co., 2012
- Forrest, Hainline III, American Pasta Co. vs. New World Pasta Co. (re: "America's favorite pasta"), 2002
- Fulbright & Jaworski: Deere and Co. vs. MTD Holdings, 2003
- Gibson, Dunn, & Crutcher:
 - a) Pfizer, Inc. vs. International Rectifier Corp., 1982-1983
 - b) Thompson vs. General Nutrition Corp., 1985
 - c) New Vector vs. Metro Mobile, 1986;1992
 - d) Air Passenger CRS Antitrust Litigation vs. American Airlines, 1987-1990
 - e) Quintons/Mahurkar vs. Shiley
 - f) McCaffrey vs. Pfizer re: Plax, 1990
 - g) The Travel Difference vs. The Time Mirror Co. (LA Times), 1992
 - h) Toyota re: class action defense vs. Staples Stillwell on the "destination charge" on Monorail Stickers, 1995-1996; 1999.
 - i) Hewlett-Packard vs. Nu-Kote Int. Inc., Anti-trust, 1998-1999
 - j) LA Cellular AT&T Wireless class action defense, 2002, 2004.
 - k) Hewlett Packard defense vs. Staples Stillwell in class action suit re economy cartridge, 2003
 - l) Federal Trade Commission vs. LendingClub Corporation (d/b/a LendingClub), 2020
- Global Business Experts Group:
 - a) Yeti Coolers, LLC vs. RTIC Coolers, LLC; John Jacobsen; and James Jacobsen, 2016
- Gold, Farrel & Marks: Miramax Film Corp. vs. Columbia Pictures Entertainment, re: *I Know What You Did Last Summer* (1997)
- Goodell, DeVries:
 - a) Roth Licensing, LLC vs. GAC International, LLC, ADR Services, 2017
- Goodwin Procter LLP:
 - a) FTC vs. New Balance re: "made in USA", 1995-1996 [FTC Hearing] and consulting, 1998
 - b) Public Media Center and People of the State of California vs. Del Monte Corp & Bumble Bee Seafoods. Re: Proposition 65 Mercury In Tuna, 2006
 - c) Environmental World Watch, Inc. vs. The Procter & Gamble Distributing Co.; Council for Education & Research on Toxics vs. McDonald's Corp., et al.; and People of the State of California vs. Frito-Lay, et al., 2007.
 - d) Legalzoom.com vs. Rocket Lawyer, 2014
- Greenberg Traurig LLP:
 - a) Chatham et al vs. Sears Roebuck & Co. Re: Craftsman Made in USA, 2007-
 - b) Whirlpool Corp. vs. Sensata Technologies and Texas Instrument, Inc., 2011
 - c) Curt Schlesinger vs. Ticketmaster, 2011
 - d) Santamarina , et. al. vs. Sears Roebuck & Company, 2012
- Hackler Daghlian Martino & Novak LLP
 - a) TherapeuticsMD, Inc. vs. Evofem Biosciences, Inc., 2021
- Hapgood, Calimafole, Kalil, Blaustein & Judlowe: Merrill Lynch vs. Paine Webber (re. RMA), 1985
- Heller, Ehrman, White, and McAuliffe: Apple Computer Securities Litigation, 1985-1986.
- Herling, Lindeman, Goldstein and Siegal: Roli Boli vs. Pizza Hut, 1997
- Hill, Betts, and Nash: Fender Musical Instruments Inc. vs. E.S.P. Co., 1985
- Howrey, Simon, Arnold & White:
 - a) Sands, Taylor and Wood vs. The Quaker Oats Co. re: Thirst-Aid, 1987
 - b) Syntex, Inc. vs. Schering-Plough Healthcare Products, Inc. re: Femcare, 1992

- c) Anheuser Busch (re Bud Dry commercials), 1993
- d) Anheuser Busch vs. Labbatt (re: Ice Beer), 1994-1995
- e) Anheuser Busch vs. Samuel Adams, 1995
- f) Anheuser Busch vs. United Guiness Distillers (re: Red Label from Budweiser), 2002
- g) Nissan North America vs. BMW (re: "Z"), 2002
- h) Consulting Re: Schering Plough, 2007
- IT&T Continental Baking vs. FTC re. Fresh Horizons advertising, 1977-1978
- Jenner & Block:
 - a) General Dynamics vs. AT&T. re: Antitrust litigation, 1987-1990
 - b) AT&T vs. MCI re: Telemarketing Practices 1990
 - c) Recording Industry Association of America, Re: Adjustment of Rates & Terms for Satellite Digital Radio Services (Copyright Royalty Board), 2006-2008
 - d) In Re: Adjustment of Rates and Terms for Preexisting Subscription Services and Satellite Digital Audio Radio Services before the Copyright Royalty Board, 2007
- Katten Muchin Rosenman:
 - a) Nisha Brown, Kathy Williamson, individually and on behalf of all others similarly situated vs. Wal-mart Stores, Inc., and Does 1 20 through 50 inclusive, 2018
- Kaye, Scholer, Fierman, Hays & Handler:
 - a) Automated Bread Dist. Corp. vs. General Foods Corp. (Re: Freihofer Baking Co.), 1991-1992
 - b) Zone Perfect Nutrition Co. vs. Hershey Foods Co., 2004
- Kenyon & Kenyon:
 - a) Mead Data Control, Inc. vs. Toyota Motor Sales, U.S. re: Lexis vs. Lexus, 1988
 - b) Hiram Walker and Sons vs. White Rock Distilleries re: Kapala-Kahlua
 - c) America Online vs. AT&T Corp. re: AT&T's "You Have Mail", 1999
 - d) Twentieth Century Fox Film vs. Marvel Enterprises, Inc. (re: Mutant X), 2002
 - e) Petition for Cancellation of the Registration of the Gakic Mark, 2006
- Kirkland and Ellis:
 - a) Kraft Foods Inc. and Capri Sun vs. Minute Maid, 1997
 - b) Time Inc. vs. Peterson Publishing Co. re: Teen vs. Teen People, 1997-1998
 - c) Brach and Brock vs. James River re: Royals candies, 1998-1999
 - d) Hermes vs. Lederer, re: the Kelly Handbag, 1998-2001
- Kirkpatrick and Lockhart: McPalland et al vs. Keystone Health Plan Central, Inc. (re: class certification of SeniorBlue Customers, 2001-2002
- Kleinfeld, Kaplan and Becker: re: Iron-Kids Bread Package, 1991
- K&L Gates LLP:
 - a) Quia Corp. vs. Mattell Inc. and Fisher-Price Inc., 2010.
 - b) Sara Lee Corporation vs. Kraft Foods, Inc. and Kraft Foods Global, Inc., 2011
 - c) Sara Lee Corporation vs. Kraft Foods, Inc. and Kraft Foods Global, Inc., 2012
- Kramer Levin LLP: Finjan, Inc. vs. McAfee, Inc., Symantec Corp., Webroot Software, Inc., Websense, Inc., and Sophos, Inc., 2012
- Latham & Watkins, LLP:
 - a) American Airlines, Inc. vs. Delta Airlines, Inc., 2020
- Lee, Toomey, and Kent Pfizer Pharmaceuticals vs. the IRS, 1978-1979
- Lempres & Wulfsberg and Kutak, Rock, & Campbell: Evaluation of Expert Reports, re: International Pharmaceutical Products, Inc., 1985-1990
- Liddy, Sullivan, Galway, and Begler:
 - a) Coopervision, Inc. vs. CTL, Inc. (re: Permatint), 1985
 - b) Johnson & Johnson, Inc. vs. Oral-B Laboratories (re: Minute-Gel), 1987
 - c) Soft Sheen's Care Free Curl vs. Revlon's I of Nature (Trademark), 1986-1987.
 - d) Oral-B Laboratories, Inc. vs. Johnson & Johnson, Inc. (re: Reach Advertising), 1986-
- Locke Lord Bissell & Liddell: The Gap, Inc. and Gap (Apparel) LLC vs. G.A.P. Adventures, Inc., 2009
- Lowenstein, Sandler: Princeton Economics Group vs. AT&T (re: class action defense of spirit), 1994-1995
- Maurice Blackburn Cashman Pty Ltd: Biota Holdings Ltd and Anor vs. Glaxo Group Ltd. & Ors. Re: Relenza, 2006-
- Mitchell, Silberberg & Knupp: Stella Foods Inc. vs. Cacique IC, re: Ranchero, 1997-1999

- Morgan, Lewis and Bockius: Scott paper defense in the Turnabout Marketing Case, 1983
- Morison, Cohen, Siner, and Weinstein, Hertz vs. Avis, 1994.
- Morrison & Foerster [and Bingham McCutchen; Arnold & Porter; Goodwin Procter; Greenberg Traurig]:
 - a) Prop 65 [Re Acrylanide in Potato Chips and French Fries]: Environment World Watch Inc. vs. P&G Distributing Company
 - b) Council for Education and --- on Toxins vs. McDonald's Corp
 - c) People of the State of California vs. Frito-Lay Inc., 2007-2008.
- Moses & Singer: THOIP (A Chorion Limited Company) vs. The Walt Disney Company, 2009-10
- Munger, Tolles and Olson:
 - a) FTC vs. Polygram Holdings et al. re: Three Tenors Case 2001-2002
 - b) Universal vs. MGM (re: Rollerball) 2002
- Odutola Law: Spirits Int. N.V. vs. Distilleries Melville Ltd. Re: Moskovskaya vs. Moskova, 2007-
- Pattishall, McAuliffe, Newbury, Hilliard, & Geraldson:
 - a) S.C. Johnson and Son, Inc. vs. Carter Wallace ("Edge" vs. "Rise"), 1983
 - b) Anheuser Busch vs. Stroh Brewery Co. and vs. Miller and Heillman, (re: LA beer), 1984-1985
 - c) S. C. Johnson & Son Inc., re: L'envie, 1986-1987.
 - d) Shelby Motor vs. Ford, 1988.
 - e) GFA Brands Inc. and Fitness Foods Inc. vs. Canbra Foods Ltd. and Campbell Mithun/Esty, Inc. re Heartlight, 1990-1991.
 - f) AT&T vs. MCI (various deceptive advertising cases) 1991-
 - g) Walt. Disney vs. Good Times, 1993
 - h) Car Freshener Corp. vs. S.C. Johnson and Son, Inc. (re:Glade Plug Ins Air Freshener Design), 1994
 - i) International Telecharge, Inc. vs. AT&T, 1992-1994
 - j) S.C. Johnson and Son, Inc. vs. Avon (re: Skin So Soft) 1996
 - k) GTE Card Services Inc. vs. AT&T, 1996
 - l) SunAmerica Corp. vs. Sun Life Assurance Co. of Canada 1993-1995, 1997-1998 [W.H. Covington and Burling]
 - m) Blue Cross Blue Shield vs. American Medical Association, re: CPT, 1998
 - n) Encyclopedia Britannica, Inc. vs. Britannica Home Fashions, Inc., 1999
 - o) Simon Property Group, L.P. vs. mySimon Inc., 2001-
 - p) Montblanc – Simplø Gmblt vs. Savonerie et Parfumerie Bernard, 2001
 - q) Old World Industries, Inc. vs. AutoMeter Products, 2002
 - r) JLJ Inc. vs. Santa's Best Craft (Christmas tree lights), 2004
 - s) Energy Brands Inc. (Glaceau) vs. Pespico Inc. and South Beach Beverage Co., Inc Re: Sobe Life Water, 2006
 - t) Auto Meter Products Inc. vs. Maxima Technologies & Systems LLC, 2007
 - u) Dyson, Inc. vs. BISSELL Homecare, Inc., 2012
 - v) Select Comfort Corp. vs. The Sleep Better Store, 2013
 - w) Sweet Street Desserts, Inc. vs. Chudleigh's LTD., 2014
 - x) Sandoz, Inc. vs. Glaxo Group LTD, 2018
- Paul, Weiss, Rifkin, Wheaton and Grassier:
 - a) Revlon vs. L'OREAL re: Colour Endure Commercials 1995
 - b) Revlon vs. Cover Girl self-renewing lipstick advertising, 1996 [NAD]
 - c) Castrol vs. Penzoil (re comparative advantage) 2008.
 - d) Gianni Versace S.R.L. vs. Fashion Nova, Inc., 2020
 - e) Duracell U.S. Operations, Inc. vs. Energizer Brands, LLC, 2020
- Pepper, Hamilton and Scheetz:
 - a) Del Monte Corp. vs. Sunkist Growers, Inc. Arbitration, 1990-1991
 - b) Sun Oil Company defense against class action certification, 1996-1997
- Pennie & Edmonds IT&T Continental Baking (C&C Cola): defense against Coca Cola re: C&C Cola, 1978
- Perkins Coie:
 - a) Patrick Garrett, Jeff Mains and Linda Eustice, individually and on behalf of all other similarly situated vs. Bumble Bee Foods, LLC, 2017

- Pillsbury, Madison & Sutro: Consulting re:
 - a) Thrifty Rent-A-Car vs. Elder, 1991-1992
 - b) Green Giant American Mixtures, 1994
 - c) Chrysler Corp. vs. Replacement Sheet Metalparts Distributors, 1992-1993
- Pillsbury Winthrop LLP:
 - a) Mulligan vs. Pacific Bell Telephone Co. (inside wiring), 2004
 - b) State of California vs. Tri-Union Seafoods, et al. (Canned Tuna, Proposition 65)
- Quinn Emanuel:
 - a) Louis Vuitton Malletier, S.A. vs. Hyundai Motor American, 2011
 - b) Moldex-Metric, Inc. vs. McKeon Products, Inc., 2012
 - c) Apple, Inc. vs. Samsung Electronics Co. Ltd., 2012
 - d) Forever 21, Inc. vs. Gucci America, Inc., 2018
 - e) PGA Tournament Corporation, Inc. vs. Lamington Farm Club, LLC (d/b/a Trump National Golf Club Bedminster), 2021
- Rogers and Wells [and the Italian Trade Commission], re: Italian pasta dumping case, 1996
- Roll Law Group:
 - a) POM Wonderful LLC vs. The Coca-Cola Company, 2015
- Sidley Austin LLP:
 - a) Industrial Gas litigation, 1986
 - b) Land O'Lakes, Inc. vs. Bakers Franchise Ltd., 1987
 - c) Ultramar, Inc. vs. CITGO Petroleum Corporation, 1997
 - d) AT&T vs. US West Communications, re: US West Advertising, 1998
 - e) DIRECTV, 2017
 - f) Federal Trade Comission vs. DIRECTV, 2016
 - g) Federal Trade Comission vs. DIRECTV, 2017
 - h) Merck & Co., Inc. and Merck, Sharp & Dohme Corp. vs. Merck KGAA, 2019
 - i) Federal Trade Commission vs. Fleetcor Technologies, Inc., et al, 2021
 - j) The People of the State of California vs. Ashford University, LLC; Zovio, Inc.; and Does 1, 2021
- Sills, Cummis, Zuckerman, Radin, Tischman, Epstein and Gross: E.R. Squibb and Sons, Inc. vs. Stuart Pharmaceuticals, 1991
- Skadden, Arps, Meagher, & Flom:
 - a) American Home Products vs. Beecham re: Delicare commercials, 1986
 - b) Tambrands, Inc. vs. Warner-Lambert Co. re: EPT commercials, 1986-1987
 - c) Beecham Inc. vs. Yankelovich, Clancy, Shulman and Saatchi & Saatchi Holdings, Inc., re: projections for Delicare, 1986-1988
 - d) American Express vs. MasterCard re: Goldcard, 1988
 - e) Challenge to the networks by Sterling Drug re: Bristol Myers Tribuffered Bufferin commercials, 1988
 - f) Challenge by Dow Brands, Inc. of the TV advertisement for Reynolds Metals Company's "SURE-SEAL" food storage bags, 1989
 - g) Anheuser-Busch Company vs. Coors Brewing Company (various deceptive advertising cases) 1991-1993
 - h) R.H. Donnelley vs. Sprint Publishing and Adv. Inc., re: Sprint Yellow Pages, 1996
 - i) Anheuser Busch vs. Boston Beer re: A-B advertising [NAD], 1997
- Spirits International BV: N.V. vs. S.S. Taris Zeytin, Opposition No. 91163779 before the Trademark Trial and Appeal Board, 2006
- Steptoe & Johnson LLP: DirectTV Inc. and EchoStar Satellite LLC vs. William W. Wilkins, Tax Commissioner of Ohio 2006-2007
- Sullivan & Cromwell: Remington Rand Corp. vs. Amsterdam-Rotterdam Bank N.V., 1991
- Van Hagey & Bogan, Ltd.: Consulting re: The Quaker Oats Co, 1991
- Venable LLP:
 - a) Get Kaiser, Inc., Kaiser Fitness, LLC, and Anna Kaiser vs. AKT Franchise, LLC and Xponential Fitness, LLC, 2020
- Vinson & Elkins LLP: Wal-Mart Stores, Inc. vs. GFA Brands, Inc., 2009
- Weil, Gotshal and Manges:
 - a) Johnson & Johnson vs. SmithKline Beecham, Re: Tums Advertising, 1991
 - b) Schering-Plough Healthcare Products vs. Johnson and Johnson, Inc. (re: Neutrogena

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- Chemical-Free Sun Block), 1996
- c) Pharmacia Corp. vs. Glaxosmith Kline Consumer Healthcare (re: NicoDerm advertising), 2002-2003
- d) Priceline.com re: NAD, 2003
- White & Case:
 - a) Trovan Ltd. and Electronic Identification Devices vs. Pfizer Inc. re: Trovan's trademark, 1999
 - b) Frederick E. Bouchat vs. Baltimore Ravens, Inc. and NFL Properties Inc., (re: the Ravens Logo), 2001-2002
 - c) Oakland Raiders vs. TBB and NFL, 2003 [with Bingham McCutchen]
- Whiteman, Breed, Abbott & Morgan:
 - a) Pepsi Cola Company: Defense against Coca Cola Co. re: The Pepsi Challenge, 1978; 1981; 1995 [Mostly with the NAD]
 - b) Burger King Comparative Advertising Campaigns vs. McDonald's and Wendy's, 1982-1990
- Winston & Strawn, LLP:
 - a) Verizon Directories Corp. vs. Yellow Book USA, Inc., 2004
 - b) Merix Pharmaceuticals vs. GlaxoSmithKline, Re: Releev, 2006
 - c) Dyson Technology Ltd. vs. Maytag Corp., 2006-2007
 - d) Procter & Gamble Co. vs. Ultero Inc. 2007
 - e) Dyson Technology Limited vs. Hoover, Inc. and Maytag Corp., 2007
 - f) GlaxoSmithKline Consumer Healthcare LP vs. Merix Pharmaceutical Corp, 2007
 - g) Doctor's Associates Inc. vs. QIP Holders LLC & iFilm Corp.: Subway vs. Quiznos, 2008
 - h) LG Electronics USA, Inc. vs. Whirlpool Corp., 2009
 - i) The Scotts Company LLC vs. Central Garden & Pet Company and Gulfstream Home & Garden, Inc., 2009
 - j) Dyson, Inc., vs. Oreck Corporation, Oreck Holdings, LLC, Oreck Direct, LLC, Oreck Merchandising, LLC, Oreck Sales, LLC, Oreck Homecare, LLC, and Oreck@Home, LLC 2009
 - k) LG Electronics USA Inc. vs. Whirlpool Corporation, 2010
 - l) Western Sugar Cooperative, et al. vs. Archer Daniels-Midland Co., et al., 2014
 - m) Fieldturf USA, Inc. and Fieldturf Tarkett, Inc. vs. Astroturf, LLC, 2015
 - n) David Davies (d/b/a Davies Home Services), individually and as the representative of a class of similarly-situated persons vs. W.W. Grainger, Inc., 2016

V. Illustrative Marketing Research Clients:

1. Air Canada (1973*)
2. American Cyanamid (1972-1973)*
3. Atlantic Richfield Company (1971-1972)*
4. Bankers Trust Company (1973-1974)*
5. BBD&O (1974-1982)
6. Bell Telephone Company of Pennsylvania (1974;1977)
7. Bissell, Inc. (1969-1971)*
8. Bristol Myers Squibb (1998-2005)
9. Brown & Williamson Tobacco Corp. (1978-1979)
10. Bureau of Newspaper Advertising (1974)*
11. Campbell Soup Company (1972-1973)*
12. CBS (1972)
13. Chrysler (via BBD&O) (1975-1978)
14. Clorox Company (1975-1976)
15. Colonial Penn Group, Inc. (1973-1979)
16. Commercial Union Assurance Companies (1974-1975)
17. Connecticut Bank and Trust Company (1972)*
18. Downe Publishing, Inc. (1972-1973)
19. Eastman Kodak Company (1973)*
20. Edward D. Jones (1985-1987)
21. E.F. Hutton (1981-1984)
22. First Pennsylvania Banking and Trust Company (1971-1972; 1974-1975)*
23. General Electric (via BBD&O 1977) (1982)

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- 24. General Foods Corporation: the Jell-O and Kool-Aid divisions and various departments of the corporate product development division (1969-1972)*
- 25. Geometric Data (1981)
- 26. International Air Transport Association (1973-1975)*
- 27. International Harvester Company (1975)
- 28. International Harvester Credit Corporation (1973-1974)*
- 29. IT&T Continental Baking Company (1972-1978;1982)
- 30. Lever Brothers Company (1971-1973)*
- 31. Marriott Corp. (1982)
- 32. Modern Medicine (1970)*
- 33. MRCA (1975-1987)
- 34. Pacific Bell (1981-1982)
- 35. Pepsi Cola (1981)
- 36. Pfizer Pharmaceuticals, Inc. (1975-1990)
- 37. Pillsbury (1975)
- 38. Pioneer Electronics of America (1978)
- 39. RCA Computer Division (1972)*
- 40. Sears Roebuck & Company (1972-1973)*
- 41. SEI Investments (1988-present)
- 42. Singer (1973)
- 43. SmithKline and French (1971)*
- 44. Snelling and Snelling, Inc. (1973-1974)
- 45. Sterling Drugs (1985-1986; 1990-1992)
- 46. Stroh Brewery Company (1970)*
- 47. Sun Oil Company (1972)*
- 48. Syntex Laboratories, Inc., (1976-1977)
- 49. The Wool Bureau, Inc. (1975)
- 50. Twentieth Century Fox (via the Data Group, Inc.) (1972)
- 51. UNICOM (1973)
- 52. U.S. Dept. of Commerce, Office of Telecommunications (1972)
- 53. Western Airlines (via BBD&O) (1979)

The research projects designed and conducted for these firms covered variety of consumer and industrial marketing problems including product positioning and market segmentation, new product development, generation and evaluation of new products, and promotional concepts. Projects with * were conducted via Robinson Associates.

VI. Illustrative Marketing Research Program Evaluation and Redesign:

- 1. Bristol Meyer Squibb: Redesign of the Marketing Research function and various research and modeling procedures (1999-2002)
- 2. Brown and Williamson: copy and concept testing (1978-1979)
- 3. Colonial Penn: all aspects of research (1973-1980)
- 4. IT&T Continental Baking: copy and concept testing, segmentation studies (1972-1978)
- 5. Pfizer Pharmaceuticals: image studies, new product selection models, etc. (1975-1990)
- 6. R.J. Reynolds Tobacco: new product development system (1979-1980)

VII. Illustrative Intra-Company Marketing Strategy (and Marketing Research) Workshops:

Estee Lauder (2012 to present)
 SEI Corporation (1990 to present)

- 1. American Medical International (1978)
- 2. Amoco Fabrics Co. (1984; 1988)
- 3. ARA (1983)
- 4. Asociacion Mexicana de Ejecutivos en Planeacion (1979)

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5. AT&T (1972-1978)
6. Atlantic Richfield Company (1971)
7. Bank of East Asia (2005)
8. BBD&O (1974-1983)
9. Bell Atlantic (1983)
10. Bell Canada (1980)
11. Black and Decker (1981)
12. Bristol Myers Squibb (1998)
13. Campbell Soup (1972)
14. Career Futures, Inc. (1975)
15. Certain-Teed Corporation (1983)
16. Colonial Penn Group (1975-1980)
17. Computer Science Corporation (1975)
18. Contel (1989)
19. Daymon (2004)
20. Deutsche Bank (2004)
21. Di Giorgio Corp (1980-1981)
22. Edward D. Jones & Co. (1983)
23. E.F. Hutton (1979-82)
24. Ethicon, Inc. (1979)
25. General Foods (1970)
26. Gray Advertising, Inc. (1977)
27. IBM – Applied Business Systems (1988)
28. Intermountain Health Care, Inc. (1978)
29. International Harvester (1974-1975)
30. ITT Water Technology Group (2004)
31. Li & Fung (2005)
32. Los Angeles Times (1993)
33. 3M's Marketing Council (1986)
34. Machinist Publishing Co., Ltd., Japan (1977)
35. Miles Laboratories Ltd., Canada (1973)
36. MRCA (1978)
37. New York Telephone Company (1976)
38. Pfizer Pharmaceutical, Inc. (1975-1987)
39. Phillips Petroleum Company (1992-1993)
40. The Pillsbury Company (1976)
41. Rhodia, Brazil (1979)
42. Schlachman Research, U.K. (1975)
43. SmithKline & French (1970)
44. Spectra-Physics (1983)
45. Standard & Poors (1998)
46. Syntex Laboratories, Inc. (1976)
47. Tektronix, Inc. (1978)
48. The Bunge Group (1982) Spectra-Physics (1983)
49. The Clorox Company (1975)
50. The Executive Forum (1979)
51. Unilever, U.K. (1975)
52. Union Mutual (1981)
53. Wyeth International Ltd. (1980)
54. Xerox (1981)

VIII. Selected International Consulting

Li & Fung, Hong Kong: Business Strategy (1998 to present)

1. UNIG, Singapore, Business Strategy (2000)
2. Hakuhodo, Japan: Design of a 21st Century Advertising Agency (1993-1997)
3. Wickes, plc., UK: Marketing and business consulting (1988-1996)

4. McKinsey, Milan: New Developments in Marketing Strategy, Research, and Modeling (1988)
5. Bunge Group, Brazil: Marketing planning (1982-1986)
6. Meridian Group U.K.: Marketing and Business Strategy (1985-1986)
7. Sunstar, Japan: Marketing and Business Strategy (1985)
8. P.E. Consulting Group, South Africa: Strategic planning & Marketing Consulting and Conducting Executive Seminars (1982)
9. Bell Canada, Canada: Market Segmentation Study (1979-1981)
10. Cooperative de Seguros de Vida, Puerto Rico: Design of a marketing planning system (1980)
11. Discount Bank, Israel: Marketing planning (1980)
12. Bank Leumi Ltd., Israel: Marketing planning (1978)
13. Fuji electric, Japan: Design of a management planning process (1977)
14. Koor Industries, Israel: Designing and organizing the marketing function for the corporation's 34 companies (1968-1969)

IX. Consulting to Government Agencies

1. FinCen/BENS project on Terrorist Financing, 2003-2004
2. U.S. AIR FORCE: Evaluation of the Air Force resource allocation procedure (1980-1981)
3. CANADIAN GOVERNMENT: Industry, Trade & Commerce Design and execution of a study for evaluation of the U.S. market potential for selected Canadian medical diagnostic and therapeutic products (1980-1981)
4. U.S. PATENT AND TRADEMARK OFFICE: Designing a strategic planning system (1981)
5. NASA: Evaluation of NASA's IAC's 1976 advertising campaign and recommendations for its future advertising and marketing strategy (1977)
6. ISRAEL DEFENSE MINISTRY: Analyze and evaluate the marketing system of the Administered Areas (Arab territory prior to the 6-Day War). The findings and recommendations of this study were submitted in classified report to the Israeli Defense Ministry (1968-1969)

X. Consulting/Advising to Research Organizations

1. Member of the advisory committee of the Diebold Institute study of the impact of public policy on entrepreneurial startup companies: the U.K. and U.S. in biotech and IT, (1998 -2000)
2. Institute of Business and Economic Research, University of California, Berkeley. Consultant on the Coping Behavior (an empirical study of the consumer-technology interface) project, sponsored by the National R&D Assessment Program, NSF. (1976-1981)
3. Pennsylvania Science and Engineering Foundation, Temple University/Applied Communication Research, Inc. Research consultant for design, analysis, and evaluation of an NSF (Office of Science Information Services) sponsored project concerning the design and evaluation of experiments for the marketing of scientific and technical information services. (1974-1977)
4. EDUCOM: Inter-university Communications Council, Inc. Participant in an interdisciplinary seminar to identify and measure special interest audiences for public television. (1974)
5. The John and Mary R. Markle Foundation.
6. Participated in a workshop for design of "Quality Ratings of TV Programs." (1979)
7. Participated in the design of a study on special interest audiences. (1975)
8. Marketing Science Institute Consultant from February 1967 to December 1968. Conduct and plan research projects primarily in the areas of industrial buying behavior, advertising, and international marketing.
9. Marketing Science Institute U.S. Department of Agriculture Study Group on Marketing Performance Principle investigator, March-December 1968. Developed a model for the evaluation of the performance of the U.S. marketing system.
10. Management Science Center University of Pennsylvania Senior staff member September 1967 to July 1968. Engaged in the development of a marketing model for Anheuser-Busch.

APPENDIX A**4. UNIVERSITY ACTIVITIES****I. University of Pennsylvania, The Wharton School****A. Program Development****1. The Wharton Fellows**

Master classes designed and directed included:

- November 27-December 2, 2000: Philadelphia: Transformation Leadership
- January 7-January 12, 2001: Silicon Valley: Transformation Leadership
- February 18-February 24, 2001: Barcelona: Transformation Leadership
- March 15-March 17, 2001: Philadelphia: Transformation Leadership
- May 6-May 12, 2001: Philadelphia, Wharton: Transformation Leadership
- June 3-June 9, 2001: Barcelona/Helsinki: Transformation Leadership
- July 8-July 14, 2001: Silicon Valley: Transformation Leadership
- March 17-March 22, 2002: CEO Forum: Transformation Leadership
- April 21-April 25, 2002: Silicon Valley/San Francisco: Transformation Leadership
- June 9-June 11, 2002; Munich
- November 3-November 8, 2002: Foundations I: Philadelphia
- January 5-January 9, 2003: Foundations II: San Francisco: Transformation Leadership
- September 7-Spetimeber 9, 2003: Top Line Growth in Turbulent Times: Philadelphia
- January 7-January 9, 2004: Success: What's Next?: Seattle
- April 25-April 28, 2004: Milken & the Media: Los Angeles
- June 1-June 8, 2004: Leveraging Japan: Tokyo; China: Transformation from the Inside: Shanghai
- November 12-November 14, 2004: Toward a New Europe: Prague, Czech Republic
- December 12-December 14, 2004: Merger, Acquisition and Renewal: New York
- March 6-March 9, 2005: Market & Sourcing Opportunities in India: Mumbai & Bangalore, India
- June 26-June 28, 2005: Working with Government, Washington D.C.
- November 22-November 27, 2005: Design, Innovation and Strategy: Copenhagen, Denmark/Milan, Italy
- December 4-December 6, 2005: Opportunities in Latin America and the US Hispanic Markets: Miami
- April 5-April 7, 2006: What's Next? Silicon Valley
- June 4-June 6, 2006: Islam and the West: Istanbul
- February 25-February 27, 2007: Managing in an Evolving World, Philadelphia
- May 21-May 23, 2007: Globalization Revisited, Shanghai
- October 14-October 16, 2007: The Next Big Thing, Silicon Valley
- January 9-11, 2008: Innovation, Customer Insights and Creative Growth Strategies, with David Reibstein, Las Vegas.
- April 6-8, 2008: Creativity and Innovation, with Karl Ulrich, Philadelphia.
- October 11-15, 2008: Islam and the West: Insights and Opportunities, with Bulent Gultekin, Dubai.
- May 17-19, 2009: Philadelphia: Finding Opportunity in Times of Economic Crisis
- October 25-27, 2009 Washington DC: Opportunities in Times of Crisis: The Changing Relationship between Business and Government
- June 6-10, 2010: China: Insights and Opportunities, Shanghai, China.
- October 8-12, 2010 Israel: The Holy Land of Innovation and Entrepreneurship
- May 2-4, 2010: Lessons for profitable growth: New York
- February 20-22, 2011 Philadelphia: What's Next in Management Disciplines and Business Transformation?
- October 9-11, 2011 Buenos Aires: Argentina: Insights and Opportunities
- October 13-15, 2011 São Paulo: Brazil: Insights and Opportunities
- June 27 – 29, 2011 Russia: Opportunities and Insights
- October 14-17, 2012 Philadelphia, PA: Innovation and Growth

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- March 3 – 6, 2012 India: Insights and Opportunities
- July 14-17, 2013 Silicon Valley, CA: The Next Big Thing
- October 13 – 15, 2013 Discovering Africa
- August 17 – 21, 2014 Israel: The Next Big Thing
- February 9-13, 2014 New York, NY: The Next Big Thing
- May 18-21, 2014 Seattle, WA: The Next Big Thing
- October 29-31, 2014 Boston, MA: The Next Big Thing
- February 15-18, 2015 Austin, TX: The Next Big Thing
- May 17 - 20, 2015 Israel: The Next Big Thing
- September 29 – October 2, 2015 Philadelphia, PA: The Next Big Thing
- May 1 – 4, 2016 San Francisco, California: The Next Big Thing
- October 2 – 5, 2016 Singapore: The Next Big Thing
- May 7 – 10, 2017 Los Angeles: The Next Big Thing

2. The MBA X-Functional Integration Initiative (2003-2005)

3. A number of Executive Development Programs including :

- Winning in the Next Millennium: Strategies for Driving Change: Initiator and Director, December 1998.
- Wharton on the New Reality of Business: Co-Academic Director with Bob Mittlestaedt, December 2001.
- IDC's MBA @ Wharton Program, 2003-2004; October 2007, 2008, 2009, 2010 (co-director with Ziv Katalan); 2011-2012 (co-director Jehoshua Eliashberg)
- IESE / CEIBS Global CEO Program: A Transformational Journey (co-director David Heckman), 2012 and 2013
- LinKS @Wharton, 2007, 2008, 2009, 2010, 2011, 2012 and 2013

4. The e-Curriculum R&D Initiatives. Initiator/Chair of the Committee that designed the new program platform and the e-Curriculum R&D Initiatives (1999-2000) and continued direction and reinvention of the program.

5. The Advanced Management Program (AMP) Design Team (1998).

6. Wharton's Information Management Initiatives (1998-1999). Founder and co-chair (with Paul Kleindorfer) of its faculty council.

7. The Revised MBA Curriculum (1990-1991). Chaired the committee that developed the new curriculum.

8. The SEI Center for Advanced Studies in Management, founding Director. Develop and direct all Center activities and chair its faculty council, 1988-2018.

9. The Joseph H. Lauder Institute of Management and International Studies, founding Director and chairman of its faculty council. Designed and directed all the Institute's programs, including the establishment of the Institute MBA/MA program which admitted its first class of 50 students in May 1984, February 1983-July 1988.

10. Wharton International Forum. Initiated and designed the original program and chairman of its faculty council, 1987-1998.

11. Wharton Ph.D. with M.A. in International Studies. Initiated the joint program, 1988.

12. Wharton Center for International Management Studies (renamed as the Wurster Center, 1988) founding director. Designed/directed all the Center's activities aimed at the stimulation of international research at Wharton and the internationalization of the faculty and programs, 1980-1983.

13. The Wharton/SIA (Security Industry Association) Marketing Program. Initiated and designed the program which held sessions on April 1982 and November 1982.

14. The Wharton Recanati Multinational Marketing and Management Program, Co-founder, 1978.

15. The Wharton Executive MBA (WEMBA) program, chaired the committee that developed the program, 1974.

16. Marketing Programs, participated in the redesign of the marketing MBA programs, 1970; Ph.D. 1971; and Undergraduate, 1973 and 1981; including the initiation of The Wharton Dual MBA Major in Marketing/Multinational Enterprise.

APPENDIX A**B. Courses Developed and Taught**

a. Developed (courses developed by me are indicated by an *), modified and taught courses and seminars in:

Advertising Management (MBA)
 Channel Management (MBA)
 Communication Processes in Marketing* (MBA)
 Consumer Behavior* (MBA and Ph.D.)
 Creating an e-Business (MBA)*[A binational e-course to Wharton and IDC students)
 Creativity* (MBA)
 Health Care Marketing* (MBA)
 Industrial Marketing* (MBA)
 Integrating Marketing and Operations* (MBA) [developed jointly with P. Kleindorfer]
 Interactive Marketing in the Age of the Empowered Consumer (MBA)*
 International Marketing* (MBA)
 Marketing Management (MBA)
 Marketing Methods and Applications for Business Consulting* (MBA) [with P. Green]
 Marketing Research (MBA and Evening School)
 Marketing Strategy (WEMBA*, MBA)
 Multinational Management
 Necessity and Experimentation: Lessons from Israeli Innovation: Global Modular Courses
 Planning Marketing Strategy Projects (MBA)
 Product Policy* (MBA)
 Promotion Policy (MBA)
 Research Seminar (MBA and Undergraduate)

b. Course head: MBA advanced study project (1967-1968, 1974-1979), Marketing Management for non-majors (1967-1968, 1970-1971), the MBA Core Marketing Management Course (1970-1971, 1971-1972), Marketing Strategy Seminar (1974-1975)

c. Guest lecturer in various departments of the Wharton School including the Multinational Enterprise Unit, the Leonard Davis Institute of Health Economics, the Management Department, Management of the Arts Program, Decision Science, Public Policy and Management.

C. Executive Education Programs at the University of Pennsylvania – Illustrative Sessions**1) Creativity and Innovation**

- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron*,” Accessories Council, October 21, 2016.
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron*,” Wharton Club of Washington, April 26, 2016.

- “Creativity,” Advanced Management Program, June 26, October 21, 2014
- “Creating a Creative Organization,” Global CEO Program, March 4, 2014.
- “What Business Can Learn from Art,” GCEO Program, March 4, 2014.

- “Creativity,” Advanced Management Program, July 26, October 28, 2013
- “Creating a Creative Organization,” Master Class Wharton Alumni Forum, Tokyo, May 25, 2013
- “Lessons from Art and the Secrets of Creativity,” Global CEO Program: A Transformational Journey, March 14, 2013
- “Enhancing Your Personal Creativity and Challenging your Mental Models,” Comcast Women in Leadership, February 21, 2013

- “Creativity,” Advanced Management Program, June 27, October 29, 2012
- “Lessons from Art and Guidelines for Creating a Creative Organization,” Aresty IESE/CEIBS Global CEO Program, March 23, 2012.

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- Introduction to Aresty IESE/CEIBS Global CEO Program: A Transformational Journey, March 19, 2012.
- "Israel Innovation for Global Social Impact: Accomplishments and Opportunities," Wharton Global Webinar, February 3, 2012.
-
- "The Challenge of Creativity," AMP, June 20, 2011.
-
- "Creative Thinking and Action," and "Competing in a Flat World in a Time of Crisis," FirstCaribbean Leadership Programme, December 8, 2008.
- "Creative Thinking and Action," Toyota Executive Development Program, July 21, 2008
- "Creative Thinking and Action," (3 Sessions) Toyota Executive Development Program, July 21, 2008.
- "The Innovation Challenge," (2 Sessions) Raytheon Executive Leadership Development Program, June 9, 2008.
- "Wharton Fellows Philadelphia Master Class: Innovation and Creativity," Wharton Fellows, April 6, 2008.
-
- "Creative Thinking and Action," FirstCaribbean Leadership Programme, November 19, 2007.
- "Innovative Approaches to the Design of Strategy," LinKS @ Wharton, November 11, 2007.
- "Creative Thinking and Action," Toyota Executive Development Program, September 17, 2007.
- "Innovation Strategies for Profitable Growth," Wharton Fellows Philadelphia Master Class *Managing in an Evolving World*, February 27, 2007.
-
- "Advances in Innovation Management and New Product Innovation," LINKS @ Wharton, August 26, 2006.
- "Advances in Innovation Management and New Product Innovation," Quad-C Executive Session, July 10, 2006.
-
- "Creativity – A Must for Marketing Success," back-to-class session at the 2005 Wharton Marketing Conference, October 28, 2005.
-
- "Enhancing Creativity and Innovation," The Wharton e-Fellows I Program, March 2001.
-
- "Creativity and Innovation," in Wharton Workshop on Creativity and Knowledge Creation, April 1999.
-
- "Innovation and New Product and Business Development," CEO Circle, May 10, 1996.

2) Challenging your Mental Models

- "Challenging Your Mental Models," Comcast Women in Leadership Program, June 21, 2017.
- "The Power of Impossible Thinking: Challenge Your Mental and Business Models," Global CEO Program, March 13, 2017.
- "Challenging Your Mental Models," McKesson Health Solutions Product Management Program, March 7, 2017.
-
- "Challenging Your Mental Models and Toward New Marketing and Paradigm: Implications and Actions," Vertex Portfolio Leadership Program, November 30, 2016.
- "Challenging and Changing Your Mental Models," Hero Motor Corp: The iLead Senior Leadership Development Program, November 29, 2016.
- "The Power of Impossible Thinking: Challenge Your Business and Mental Models," LinKS @ Wharton, November 1, 2016.
- "Challenging and Changing Your Mental Models," IDC @ Wharton, October 31, 2016.
-
- "Challenging Your Mental Models," PVH Global Leadership Program, September 29-October 1, 2015.
- "The Power of Impossible Thinking," PVH Global Leadership Program, January 28, 2015.

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- “Challenging Your Mental Models,” Global CEO Program, March 3, 2014.
- “Challenging Your Mental Models,” Comcast Women in Leadership Program, May 14, November 12, 2014.
- “Mental Models: Power of Impossible Thinking,” Global Leadership Fellows Program, July 8, 2013.
- “Challenging the Mental Models of Advertising and Marketing,” Google Marketing Academy Module 2, June 6, 2013.
- “Challenging Your Mental Models,” Aresty IESE/CEIBS Global CEO Program, March 11, 2013.
- “Challenging Your Mental Models,” LinKS NEXT in Line Module 2: Achieving Global Lead & Global Projects- Listen Louder, January 31, 2013.
- “Challenging and Changing your Mental Models,” IDC@Wharton W12, October 19, 2012.
- “Challenging Your Mental Models of Innovation and Growth,” Wharton Fellows Philadelphia Master Class, October 15, 2012.
- “Challenging your Mental Models,” Links: Winning the Right to Serve, September 20, 2012.
- “Challenging Your Mental Models,” Cheil Worldwide Global Marketing Program, August 20, 2012.
- “Mental Models: The Power of Impossible Thinking,” Global Leadership Fellows Program World Economic Forum, July, 11, 2012.
- “Challenging Your Mental Models,” LinKS Next in Line Program @ Wharton, June 22, 2012.
- “Challenging Your Mental Models,” Estée Lauder Companies, William P. Lauder Brand Equity & Business Symposium, May 1, 2012.
- “Challenging Your Mental Models,” Aresty IESE/CEIBS Global CEO Program, March 19, 2012.
- “Challenging Your Mental Models,” Estée Lauder Companies Strategic Finance Forum, March, 5, 2012.
- “Lesson From Art & Challenging Your Mental Models,” Daimler Advanced Executive Program For Vice Presidents, December 6, 2011.
- “Challenging Your Mental Models,” LinKS Next in Line Program @ Wharton, November 10, 2011.
- “Challenging your Mental Models,” IDC @ Wharton, September 19, 2011.
- “Challenging Your Mental Models,” LinKS@Wharton WWI, September 15, 2011.
- “Challenging your Mental Models,” WEF Wharton Global Leadership Fellows Program: Personal Power and Influence, July 13, 2011.
- “Challenging Your Mental Models: The What, Why, How and Beyond,” IBM Wharton Executive Forum, July 11, 2011.
- “Challenging your Mental Models,” Wharton & Citi Asia: Leadership Program, June 21, 2011.
- “Challenging Your Mental Models,” PMA BP – CFO Executive Module 3 @ Wharton, May 9, 2011.
- “Challenging Your Mental Models,” Tyco Electronics Leadership Development Program, February 28, 2011.
- “Challenging Your Mental Models,” Tyco Electronics Leadership at Wharton, November 16, 2010.
- “Challenging Your Mental Models,” IDC at Wharton, October 18, 2010.
- “Challenging your Mental Models,” 10th LinKS Wharton Program, June 9, 2010.
- “Challenging your Mental Models,” LA CEO Global Program, May 6, 2010.
- “Challenging your Mental Models,” Tyco, February 4, 2010.
- “Challenging your Mental Models,” IDC/CEIBS@Wharton, October 15, 2009.
- “Challenging Your Mental Models,” LinKS@Wharton, June 10, 2009.
- “New Mental Models for Capitalizing on Opportunities in Times of Crisis,” LinKS@Wharton, June 10, 2009.
- “Challenging Your Mental Models,” Latin America CEO Program, April 27, 2009.
- “Challenging Your Mental Models,” ConvaTec, December 16, 2008.
- “Challenging Your Mental Models,” ConvaTec, November 12, 2008.
- “Challenging Your Mental Models,” linKS @ Wharton, October 27, 2008.
- “Islam and the West: Challenging Your Mental Models,” Wharton Fellows Dubai Master Class, October 12, 2008.

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- “Challenging Your Mental Models,” Wharton Fellows, April 6, 2008.
- “Philadelphia Master Class: The Power of Impossible Thinking,” Wharton Connect, April 3, 2008.
-
- “Challenging Your Strategic Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “The Power of Impossible Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Challenging Your Mental Models,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Challenging Your Mental Models,” LinKS @ Wharton, November 12, 2007.
- “The Power of Impossible Thinking,” Wharton Connect, November 1, 2007.
- “The Power of Impossible Thinking and Global Strategic Management,” CEIBS @ Wharton, June 18, 2007.
- “Challenging Your Mental Models,” Estée Lauder Companies General Management Program, January 28, 2007.
-
- “Challenging Your Mental Models,” Wharton’s Business Initiative re: Building Winning Profitable Organization in Professional Team Sports, March 19, 2006.
- “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006
- “Creative Thinking and Action,” Toyota Executive Development program, September 26, 2006.
-
- “The Power of Impossible Thinking,” A Wharton Fellows Dinner Event, Kuala Lumpur, March 2005.
-
- “Growth Strategies and New Mental Models,” Wharton Fellows, August 2003.
-
- “Capturing Opportunities and Developing New Mental Models,” Wharton on the New Business Reality, December 2001.

3) Transformation and Growth

- “Profitable Growth Stratgies,” Links: Winning the Right to Serve, September 20, 2012.
-
- “Business Models of the Future,” 10th LinKS Wharton Program, June 9, 2010.
- “Creating a New Business Paradigm,” Latin America CEO Global Program, May 10, 2010.
-
- “Opportunities In Times of Crisis,” Wharton Fellows, May 17, 2009.
- “Opportunities In Times of Crisis and Recession,” Knowledge@Wharton Advisory Board, May 14, 2009.
- “Opportunities In Times of Crisis,” Meeting of the Advisory Board of the Jay H. Baker Retailing Initiative, June 23, 2009.
- “Progress, Problems, and Prospects,” Wharton Fellows, May 12, 2009.
- “Creating a New Business Paradigm,” Latin America CEO Program, April 27, 2009.
-
- “Stretch Objectives, Synthesis and Strategy,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Expand Customers, Value Creation and Diabetic Pathways,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Integrating Strategies and Leveraging Synergies,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “The Evolving World,” LinKS @ Wharton, November 12, 2007.
- “The Evolving World,” Wharton Fellows Philadelphia Master Class, February 27, 2007.
- “Leadership Challenges in the Pharmaceutical Industry,” TEVA Israel *Leading Your Business*, June 28, 2007.
-
- “A View from the Top: The Perspective of the Enlightened CEO,” Wharton Executive Leadership Program for AICPCU, April 2005.

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- Strategy Discussion with Telenet's Top Management, March 11, 2003.
- "Organizational Change: Problems, Progress, and Prospects," PricewaterhouseCoopers Strategy Master Class, July 26, 2002.
- "Capturing Business Opportunities in a Changing World," SIA Institute, 50th Anniversary Program, March 2002.
- Winning in the Next Millennium, "Driving Change," 1998.
- Stennis Congressional Fellows Program at Wharton, "Driving Change: Creating Winning 21st Century Organizations," 1997.
- "Management in the 21st Century," Wharton AMP, Philadelphia, PA, September 1989.

4) Marketing and Branding

- "Global Branding Strategy," Brand Leadership: Strategies for Driving Growth in a Global Marketplace, Philadelphia, PA, June 5, 2013.
- "Towards a New Marketing Paradigm," IDC@Wharton November 25, 2012.
- "Rethinking Your Marketing Strategy," Aresty IESE/CEIBS Global CEO Program, March 19, 2012.
- "Marketing and Business Strategies in the Age of the Empowered Consumer," IDC @ Wharton, September 19, 2011.
- "Rethinking Your Marketing Strategy," Latin America CEO Global Program, May 14, 2010.
- "Reinventing Marketing," IDC/CEIBS @ Wharton, October 21, 2009.
- "Opportunities in Reinventing Marketing," Wharton Fellows, May 18, 2009.
- "Is Marketing Driving Your Business Strategy?," The Conference Board 2008 Marketing Excellence Conference, November 13, 2008.
- "Destroy Your Brand," Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- "Market-Driven Organization," AICPCU and IIA Advanced Executive Education, Wharton, September 10, 2003.
- "Marketing Driven Strategies in a Global Economy," IBM's Managing Director's Executive Development Program, February 13, 2002.
- "The Impact of the e-Bus Revolution on the Marketing Discipline," Wharton Fellows in e-Business, The Impact on the Discipline, December 2000.
- "World Class Marketing: Implications for Spencer Stuart," The Wharton/Spencer Stuart Leadership Assessment Program, June 2000.
- "Marketing Strategy in the Global Information Age," AMP Program, February 23, 1998.
- "Marketing Strategy in the Global Information Age," AMP Program, October 1997.
- "Segmentation and Positioning for Sales Force Effectiveness," Sales Force Management, Wharton Executive Education, March 1997.
- Sales Force Management Program, "Segmentation and Positioning for Sales Force Effectiveness," 1987, 1990, 1997.
- "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," Keynote Address, Healthcare Marketing and Communications Council and Wharton Executive Education, Wharton School, April 8, 1996.

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- "Marketing 2000," AIMSE/Wharton Investment Institute, January 13, 1995.
- "Pharmaceutical Marketing: Emerging Challenges and Opportunities," Pharmaceutical Advertising Council and Wharton Executive Education Conference on Reengineering Pharmaceutical Marketing, February 25, 1994.
- "Marketing Strategy" in the J&J-Wharton Fellows Program in Management for Nurses, 1983, 1984, 1985, 1986.
- AMA International Conference Workshop, Philadelphia, June 1978.
- Marketing Strategy, AMP – Advanced Management Program, 1988-91; 1997-1998.

5) The Network Challenge

- "Leveraging the Network Multiplier," LinKS@Wharton, September 15, 2014.
- "Creating Network Organizations," LinKS@Wharton, September 14, 2014.
- "Network Orchestration," Global CEO Program, March 3, 2014.
- "Network Orchestration," Global CEO Program, March 13, 2013.
- "Network Orchestration in a Flat World," LinKS NEXT in Line Module 2: Achieving Global Lead & Global Projects- Listen Louder, January 31, 2013.
- "Governance and Orchestration in a Flat World," Links: Winning the Right to Serve, September 20, 2012.
- "Orchestration in a Flat World," LinKS Next in Line Program @ Wharton, June 22, 2012.
- "Orchestration in a Flat World," LinKS Next in Line Program @ Wharton, November 10, 2011.
- "Organizational Networks for Effective Competition in the Flat World, Leadership Development Program at Wharton, February 28, 2011.
- "Organizational Networks for Effective Competition in the Flat World", Tyco Electronics Leadership at Wharton, November 16, 2010.
- "The Network Challenge," SEI Executive Network, June 28, 2010.
- "Business Models of the Future: Orchestrating Alliances," LinKS@Wharton, June 10, 2009.
- "Global Economic Crisis," Latin America CEO Program, April 26, 2009.
- "Competing in a Flat World," Wharton Fellows, February 26, 2008.
- "Network Orchestration," Network-Based Strategies & Competencies Workshop, May 3, 2007.

6) Future of Advertising

- "The Future of Media in the Context of the Future of Advertising, " The Media Future Summit, October 27, 2016.
- "Creating an Agile and Innovative Organization: Lessons from the FoA Program," Strategic Agility & Innovation Workshop, June 17, 2013.
- "Facebook Roundtable," Wharton Future of Advertising, January 18, 2013.
- "Challenging your Mental Models of Advertising," Havas University Leadership Excellence Program, September 20, 2012.
- "The Future of Advertising," Cheil Worldwide Global Marketing Program, August 30, 2012.
- "The Future of Advertising," Havas/Euro University Leadership Excellence Program, October 4, 2011.
- "The Future of Advertising," Cheil Worldwide, Global Marketing Program, September 6, 2011.
- "Challenging Your Mental Models of Advertising," Austrian CEO Future of Advertising Master Class,

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March 7, 2011.

- “Insights from The Wharton Future of Advertising Project” Wharton Fellows at the Conference Board: Philadelphia Master Class, January 20, 2011.

- “The Future of Advertising”, Havas/Euro University Leadership Excellence Program, October 26, 2010.

- “The Future of Advertising is NOW,” Cheil Communications Project Based Learning in Marketing, August 19, 2008.

D. Committee Responsibility:

1. Marketing Department Committees:

- Curriculum Committee 2008-2013; 2015-2017
- Computer Committee 2009-2012
- 5 Year Plan Committee (chair), 2004-2005.
- Initiator and Chair of a Committee to develop a marketing certification program, 2004-2005
- Recruiting/Personnel Committee, since 1971. Chairman Recruiting Committee, 1978-1979; 1981-1983; 1987-1988; Co-chair of the subcommittee for recruiting of STARS 2007- .
- Curriculum Committee, Member of Committee and Chairman of a number of its subcommittees 1967-1978, and 1996-1998. Chairman of the committee 1970-1971, 1973-1975, 1976-1978, and 1980.
- Ph.D. Program Coordinator, 1972-75. Doctoral Committee, 1988-1989.
- External Boards/Affairs Committee, 1987/88; Chair 1988-1989.
- Member and Chairman of various departmental Committees, including all the department's advisory committees since 1971, Marketing Fund Committee since 1983, and its Long Range Planning Committee, 1970-1971.
- Senior Faculty Recruiting, Chairman 1995-1997

2. Wharton School Committees:

- Initiator and developer of Wharton School Publishing in conjunction with Pearson/FT, Founding Editor and member of the Faculty Editorial Board (2003-2008)
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010
- Dean Advisory Council (since its inception in 1983 to 2000) and 2007/2008; 2008/2009
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010
- Co-Chair, Search Committee for the new Director of the Lauder Institute (2006)
- Member of the Alfred West, Jr. Learning Lab Faculty Committee (2001-2005)
- Chairman, Dean's Committee on Cross-Functional Integration (2002-2004)
- Member of the Executive Development Faculty Advisory Board (2002-2004)
- Chairman of a Faculty Committee to assure cross program dissemination of e-Curriculum Developments (2000)
- Member of the Strategic Planning Steering Committee, 1999-2000
- Member of the Committee to prepare the strategy for “Management, Leadership, and Organizational Priority” area of the University’s Agenda for Excellence, 1998
- Senior Faculty Committee to Review the Global Presence strategy (Summer 1997)
- Member of the Advisory Committee on Faculty Personnel, 1976-1978; 1984-1985; 1987-1989; 1994-1995
- Chairman of the Graduate Curriculum Committee focusing on a critical examination of the MBA program and its appropriateness for preparing the leaders of the 21st century enterprises. The Committee developed the new MBA curriculum which was tested in 1991/1992 and 1992/1993 and which was fully implemented starting in 1993/1994.
- Initiated and organized the Management Education Council – the vehicle for corporate support and funding of the new MBA curriculum, 1992-1993

- The Wharton International Committee: Chairman, 1978-1981, 1982/1983, 1995-1997. [The 1995-1997 committee developed the Wharton globalization strategy.] Member: 1967-1968, 1983-1987, 1989-1991.
- Member of Boards of the following Wharton Centers:
 - The SEI Center for Advanced Studies in Management (Founder), 1988 to 2018
 - The Lauder Institute (Founder) (1983 to present)
 - Knowledge@Wharton (2011 to present)

 - The Alfred West, Jr. Learning Lab (Initiator of the Lab and Founder of the External Advisory Committee), 2001-2005
 - Risk and Decision Process Center, 1984-1986
 - The Manufacturing and Logistics Forum, 1992-2000
 - The Wharton/PIMS Research Center (Co Founder), 1985-1998
 - U.S. Japan Management Studies Center, 1989-1992
 - Wharton Emerging Economics Program, 1992-1995
 - The Wharton Center of International Management Studies (Founder), 1981-1983
 - Wharton Public Policy Initiative, 2013-present
- Dean's Planning Task Force (1986)
- Member of the School's Executive Education Policy Committee, 1987-1989
- Member or chairman of a number of Chair Search Committees, including seven chairs in Marketing (1985, 1987, 1988-1990, 1992, and 1997), Entrepreneurship (1984-1985, 1997-1998), International Management (1984-1985), Operations Management (1986), the chair and director of the US-Japan Center (1988-1991), the chair in Managerial Economics (1989), the chair in Information Technology (1996-1997), and the chair in Electronic Commerce (1999).
- Member of the (ad hoc) Committees to Review Various Units and Departments:
 - The Snider Entrepreneurial Research Center, 2004-2005
 - Finance Department, 2001-2002
 - The Real Estate Center, 1988
 - Social Systems Science, 1985-1987
 - U.S. Japan Center, 1985-1986
 - Multinational Enterprise Unit, 1977-1978
- Member of the School's Faculty Personnel Committees of:
 - The Health Care Systems Unit, 1974-1975
 - The Multinational Enterprise Unit, 1978-1979
- Member of the Committee on Academic Freedom, 1977-1978
- Chairman of the Advisory Committee for the Wharton Executive MBA Program, 1974-1975
- Chairman of the Wharton School Doctoral Admissions Committee, 1974-1975
- Graduate Academic Standards Committee, 1969/1970 – 1971-1972. Chairman of its subcommittee for the evaluation and redesign of the school's grading system
- A number of Ad Hoc Committees and task forces for the:
 - development of a core Ph.D. Behavioral Science Course, 1972-1973,
 - redesign of the International Business program, 1971,
 - review of the Economic Offerings for Business and Applied Economic doctoral students, 1970-1971,
 - development of a Continuing Education Program in Health Care Administration, November 1971/October 1973
- Evening School Committee, 1972-1973
- Behavioral Lab Planning and Implementation Committee, 1989-1990

E. Doctoral Dissertations Supervised

Bent Stidsen (1972); Yehoshua Buch (1972); Kathy Villani (1973); Rene Y. Darmon (1973); Arun K. Maheshwari (1973); Chris Hetzel (1973) winner of the AMA Doctoral Dissertation Competition; Arun K. Jain Honorable mention at the AMA Doctoral Dissertation Competition; Joel Huber (1974); Irwin D. Reid (1975); Chris Buss (1979) winner of the AMA Doctoral Dissertation Competition; Robert J. Thomas (1980) Winner of the Academy of Marketing Doctoral Dissertation Competition; Cynthia Fraser (1980); Joel Steckel (1981) Honorable Mention AMA Doctoral Dissertation Competition; John Deighton (1983); Rajeev Kohli (1984); Oliver Heil (1988); Kamel Jedidi (1988); Bari Harlam (1989);

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Kris Helsen (1990); Nino Buran (1991); Hoon Young Lee (1992); Rajeev K. Tyagi (1994); Amy Kallianpar (1998).

F. Addresses to Alumni Club and Other Groups Regarding:

1) The Joseph H. Lauder Institute

Illustrative addresses to alumni clubs and other groups on the changing needs for management education and the University's response -- The Joseph H. Lauder Institute.

1. Alumni Clubs addressed include:

- Toronto (August 1987)
- Milan (October 1987)
- Philadelphia (January 1984, January 1986)
- Long Island (January 1984, March 1986)
- Cleveland (April 1986)
- Taipei (July 1985)
- Tokyo (June 1985)
- Hong Kong (July 1985)
- Dallas (December 1984)
- London (May 1984)
- Paris (December 1983)
- San Francisco (November 1983)

2. University Groups:

- Board of Directors of the Association of Alumnae, (March 1984)
- The Vice Provost Advisory Board, (February 1984)
- Wharton Board of Overseers, (January 1984, 1997)
- Trustees (October 1983, January 1984)

3. Other Groups (partial list):

- University of Pennsylvania Trustee Committee on Academic Policy (January 1988).
- 40th National Conference of the Council on International Education Exchange, San Francisco (November 1987)
- Title VI Center Lauder conference on International Studies and Foreign Language for Management. Philadelphia (May 1986)
- University of Pennsylvania Alumni (Alumni day, Philadelphia, May 1985)
- Delaware Valley Faculty Exchange Program on International Business and Language Studies (December 1984)
- AIESEC-Northeast regional conference (October 1984)
- Deans of 50 schools in an AACSB seminar on Internationalizing the Business Curriculum (March 1984)

2) Management 2000 project, the SEI Center for Advanced Studies in Management, and the revised MBA curriculum

- Wharton External Affairs, May 2009
- Wharton-Recanati Program, 1993
- International Forum, 1993
- Erasmus University – Faculty and Administration, 1993
- Marketing Advisory Board Meeting, 1993
- Board of Directors of the Wharton Alumni Association, September 1988; May, 1993
- College of Business Administration, University of Texas at Austin C Advisory Board and Faculty, February 1992
- INSEAD Faculty and Administration, February 1992
- Security Industry Institute, 40th Anniversary Program, Wharton, March 1992\
- Wharton Advanced Management Program Participants, 1990, 1991
- The Wharton Graduate Advisory Board 1990
- Wharton's European Advisory Board 1991

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- Alumni attending the May 1991 Alumni Reunions
- The SEI Center Board of Directors 1990-1991
- The Joseph H. Lauder Institute Board of Governors 1991
- The Wharton Board of Overseers, April 1988

3) Globalization Strategy

- Dean's Advisory Board, February 1997
- Wharton Board of Overseers, March 1997
- Wharton Graduate Executive Board, March 1997
- Wharton Executive Education Advisory Board, May 1997
- European Advisory Board 1997
- Wharton Faculty 1997

4) Wharton's Information Management Initiatives (WIMI)

- All Wharton Departments 1998 – 2001
- The 1st Conference of the Wharton Alumni Club of Israel March 2001
- Dean's Faculty Lunch, April 1998

5) Cross-Functional Integration of the MBA Curriculum

- Ph.D. Proseminar (Fall 2003)
- CEO Panel for the entering 2004 class (August 2003)
- Graduate Executive Board (March 2003)
- Wharton Faculty (Feb 2003)

6) Wharton Fellows Program

- Wharton Executive Education Advisory Board (April 2004)
- Wharton Alumni Club of Atlanta (November 2001) and Israel (December 2001)

7) Wharton School Publishing

- Wharton Executive Education Group (January 2005; May 2006)
- Jay H. Baker Retailing Initiative Board (October 2005)
- Wharton School External Affairs group (February 2004)

8) Illustrative presentations regarding The Power of Impossible Thinking

- Alumni Leadership Conference, Hong Kong (May 2007)
- Wharton Connect: On Campus (March 2007)
- Wharton Connect (October 2006)
- Organizational Development Network of Greater NYC (October 2006)
- Wharton Staff Workshop (September 2006)
- The Wharton Club of New Jersey (July 2006)
- CEIBS @ Wharton (July 2006)
- Wharton Sports Business Initiative (May 2006)
- Microsoft's Latin America Financial Services CEO Roundtable (March 2006)
- LinKS@Wharton (November 2005; August 2006)
- Merrill Lynch, Investment Banking Institute at Wharton (August 2005)
- The Greater Glenside Chamber of Commerce Meeting (June 2005)
- Wharton Fellows Event, Singapore (March 2005)
- EMTM Alumni Council (February 2005)
- Miami Wharton Club (December 2004)
- Advertising Research Foundation Breakthrough Conference (November 2004)

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- Washington, D.C. Clubs of Wharton and AFLSE (September 2004)
- Deutsch Bank External Insights, New York (September 2004)
- Executive Briefing to Federal Express (September 2004)

9) Competing in a Flat World

- Links @ Wharton, Philadelphia (October 2008)
- University of Monterrey, Monterrey, Mexico (October 2008)
- American Chamber of Commerce in Hong Kong, Hong Kong (July 2008)
- The Wharton Club of Spain, Madrid, Spain (June 2008)
- CASRO International Research Conference, New York (May 2008)
- Wharton Club of Southern California, Santa Monica, California (April 2008)
- Wharton Club of New York, New York, New York (February 2008)
- Wharton Fellows, New York, New York (February 2008)
- FirstCaribbean Leadership Programme, Philadelphia, Pennsylvania (November 2007)
- Wharton Marketing Conference: Back to Class Session (October 2007)
- Milken Institute Global Conference, (April 2006)

II. University of Pennsylvania – University Committees:

- Faculty Affiliate to the Wharton Public Policy Initiative, 2013
- Member, Faculty Advisory Board, Positive Psychology Center, 2011
- Member of the Institute for Strategic Threat Analysis & Response @ Penn (ISTAR) Advisory Board, 2007
- Integrated Product Design – Overseer, 2008-2012
- Chair, Penn Social Responsibility Advisory Committee, 2008-2009 and 2009-2010
- Committee for generating new revenues by medical education initiatives, University of Pennsylvania Health System, 2007-2008
- Research Foundation Committee, Social Science and Management Review Panel, 1999-2006
- Member of the Faculty Advisory Group to Campus Development Planning Committee, 2005-2006.
- Member of the Committee on International Programs, 2002-2006
- Member of The Ackoff Center Advisory Board, 2001-2006
- Member of the Provost Art and Culture Committee, 2002-2004
- Faculty Senate Committee on Administration, 1995-1998
- Chair, Subcommittee of the Faculty Senate Committee on Faculty Teaching Evaluations, 1997-1998
- Chairman of Special Presidential Committee on Borderless Education, 1997-1998
- Provost's Task Force on the University of the Global Information Age, 1996-1997
- Faculty Editorial Board, University of Pennsylvania Press, 1996-1997
- Member of the Provost's Committee on Information Science and Technology, 1996-1997.
- Member of the Provost's Committee on Distance Learning, 1996-1997
- Chairman of a new university committee focusing on innovative revenue generation, 1992/1993 and 1993/1994. Members include the President, Provost, Chairman of the Board of Trustees, 3 deans, 3 trustees, and 3 faculty members.
- Chairman of a Subcommittee for the Evaluation of the University Office of International Programs, 1990-1991 and of a Subcommittee to Evaluate the University's Off-Campus Programs, 1991-1992.
- Member of the Provost Task Force on International Programs (1992/1993; 1993/1994).
- Member of the Provost International Council, 1990-1992.
- Member of the Commission for the 250th Anniversary Celebration of University of Pennsylvania, 1987-1990
- Advisory Board of the PBS series on The Global Economy, 1990.
- University of Pennsylvania correspondent for PBS program on Geo-economy, moderated by Ted Koppel, May 1990.
- Chairman of the Faculty Council of the Joseph H. Lauder Institute, 1983-1988.
- Member of the Board of Directors of the Joseph H. Lauder Institute, 1983 to present.
- Member of the Advisory Board of the office of International Programs, 1980 to present.

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- Chairman, the Wharton Dean Search Committee, (selected Russ Palmer) 1982/1983.
- The Senate Committee on the Economic Status of the Faculty, 1978/1979 (member); 1979/1980 (chairman).
- Member of the University's Committee on Research, 1977/1978. Chairman of its subcommittee for evaluation of the University's Policy and Conduct of Research Programs.
- Member of the FAS – Wharton Committee, 1975-1977.
- Member of the subcommittee of the University's Academic Planning Committee for the Measurement of Academic Performance, 1972/1973.

III. The Interdisciplinary Center (IDC), Herzliya, Israel

- Chairman, Higher Academic Council 1999-present
- Founder of the American Friends of IDC 1998 and a Member of the Board, 2003-present
- Faculty Promotion and Appointment Committee: Chairman 1999-2005; Member 2005-present

- Founder of the American Friends of IDC 1998 and a Member of the Board, 2003
- Designed the week-long programs at Wharton for its visiting MBA class since 2002
- Chairman, International Academic Advisory Board, 1994-2000
- Delivered the first graduation address of the Wharton IDC Marketing Communication Program, March 1999
- Delivered the first Graduation Address, October, 1998
- Co-founder (1994)
- Delivered the first Zoltan Wind lecture, 1996
- Occasional lectures in various courses, faculty seminars, and public addresses since 1995

IV. Other Universities**A. Courses Taught**

- Erasmus University (The Netherlands) – A variety of courses on marketing strategy and marketing science (1993).
- University of Tokyo (Japan) – Marketing Science (1992).
- University of New South Wales (Australia) – Doctoral Seminar in Marketing (1977).
- University of California at Berkeley – Product Policy, Doctoral Seminar (1975).
- University of Tel Aviv (Israel) – Consumer Behavior, Marketing Seminar (1968).

B. Faculty Promotion Review – Illustrative Universities

Columbia University, Harvard University, Massachusetts Institute of Technology, New York University, Pennsylvania State University, Stanford University, Tel Aviv University, University of California at Los Angeles and at Berkeley, University of Chicago, University of Georgia, University of Illinois, University of Pittsburgh, University of Rochester, University of Southern California, University of Texas, Yale, and others.

C. Program/School Review

- Indian School of Business – Organization of the Wharton Planning Meeting, April 2002.
- Rice University – member of the external review committee, 1996.
- University of Santa Clara – member of a Site Review Team for the evaluation of the school's marketing department, 1981.
- University of Tel Aviv – Initiator and organizer of the school's faculty colloquium, working paper series, planned and organized a number of the school's executive development programs and various other activities, 1968/1969.
- The Technion, Israel Institute of Technology – Outside examiner at the Graduate Division of the

Technion – The Israel Institute of Technology, Haifa, 1969.

APPENDIX A**5. OTHER PROFESSIONAL ACTIVITIES****I. Development of Research Programs [Illustrative List]**

1. The Future of Advertising (2007 to 2018)*
2. Network-Based Strategies and Competencies (2007-present)
3. Creativity and Innovation (2006-present)

4. SEI Center project Toward a New Theory of the Firm (2004-2008)
5. SEI Center project with Business Executives for National Security and FINCEN using the Suspicious Activity Reporting System (SARS) for identifying terrorist financing (2003-2004)
6. SEI Center project, Assessing the True Value of the Firm, Co-Directed with David Larcker (2002-2003)
7. The Wharton Office of Homeland Security (OHS) Project, Economic Vulnerability to Terrorism: Assessment, Prioritization and Action Implications, Co-Directed with Paul Kleindorfer (2001-2002)
8. Digital Transformation Project in Collaboration with McKinsey, WeBI and the Fishman-Davidson Center for Service and Operations Management (2001-)
9. e-Curriculum R&D Initiatives (2000-2002) and Curriculum R&D for the Wharton Fellows Decision Support Network (2001-2004)
10. The SEI Center's research program on Creating a 21st Century Enterprise. (1990 to 2018)
11. Established the Value of Marketing program. (1993-1997)
12. Initiated (with Frank Bass) the Empirical Generalizations in Marketing program. (1993-1995)
13. Co-founded (with Greg Farrington) the Virtual University Lab program (1995-1997)
14. Initiated the Computers and Art program for the ENIAC at 50 celebration (1998-1999)
15. Co-developed (with Bob Holland) the SEI Center's George Harvey Program on Value Creation Through Diversity (1996-2000)
16. Co-founded (with Paul Kleindorfer) the Information Management Initiatives Research Program (1998-1999)

II. Editorial Activities

1. Founding editor, Wharton School Publishing, 2003-2008 [see p. 46-48 for list of edited publications]
2. Initiator and editor of *Advances in Marketing Research and Modeling: Progress and Prospects – A Tribute to Paul E. Green*, Kluwer Academic Publishers, 2002.
3. Initiator and editor of *The Wharton School Publishing Newsletter* (monthly July 2005-July 2008)
4. Initiator and Co-Editor of the *Wharton Fellows Newsletter* (quarterly 2003-4; monthly January-December 2005).
5. Initiator and editor of *Wharton Executive Library* (published by Oxford University Press), 1984-1987. The series was aimed at familiarizing top management with recent developments in the various management disciplines. Books published include:
 - Gerard Adams, *The Business Forecasting Revolution, Nation-Industry-Firm*, 1986.
 - Leonard M. Lodish, *The Advertising and Promotion Challenge, Vaguely Right or Precisely Wrong?*, 1986.
 - David Solomons, *Making Accounting Policy: The Quest for Credibility in Financial Reporting*, 1986
 - James C. Emery, *Management Information Systems: The Critical Strategic Resource*, 1987.
6. Initiator and editor of the Scientific Press *Computer Based Marketing Series*. 1984-90. The series offers short books on specialized marketing topics with accompanying PC software. Books published include:
 - Paul E. Green, *CAPPA Electronic Questionnaire Display and Analysis*, 1986
 - Gary Lilien, *Marketing Mix Analysis with Lotus 1-2-3*, 1987
 - John Hauser, *Applying Marketing Management: Four PC Simulations*, 1987
 - Darral G. Clarke, *Marketing Analysis and Decision Making: Text and Cases with Lotus 1-2-3*,

1987.

- Gary Lilien, *Marketing Management: Analytical Exercise with Lotus 1-2-3*, 1988.

7. Editor-in-Chief, *The Journal of Marketing* 1978-1981 (Vol. 43-45)
8. Area Editor, *Marketing Science*, 1981-83 (Vol. 1-2); occasional Area Editor (2002-)
9. Advisory Editor of the Addison-Wesley Marketing Series, 1974-1981. Books published under my editorship include:
 - David Hughes, *Marketing Management*, 1978.
 - James Bettman, *An Information Processing Theory of Consumer Choice*, 1979.
 - Richard N. Cardozo, *Product Policy: Cases & Concepts*, 1979.
 - F.E. Brown, *Marketing Research: A Structure for Decision Making*, 1980.
10. Member of the Editorial Boards of:
 - Journal of Interactive Marketing, 1998-present
 - Journal of Business to Business Marketing, 2004
 - Journal of Global Marketing, 1986-1990
 - Journal of Product Innovation Management, 1982-1990
 - Annual Review of Marketing, 1980-1982
 - Computer Operations, 1968-1970
 - Journal of Business Research, 1974-1977
 - Journal of Consumer Research, 1973-1984
 - Journal of High Technology Management and Market Research, 1988
 - Journal of Marketing Research, 1978-1981
 - Journal of Marketing, 1971-1978
 - Journal of Organizational Behavior and Statistics, 1983
 - Journal of Pricing Management, 1989
 - Journal of Segmentation in Marketing, 1997
11. Occasional reviewer for:
 - Decision Sciences
 - IEEE Transactions on Engineering Management
 - Journal of Management Studies
 - Journal of Marketing
 - Management Science
 - Marketing Science
 - Operations Research
 - Public Opinion Quarterly
 - R&D Management
 - The Journal of Economics and Business
 - The Wharton Quarterly
12. Screening editor, *Journal of Consumer Research*, 1973-1974.
13. A judge of competitive research papers submitted to the National Conference of The AMA Academic (August) Conference in - Minnesota (1971), Houston (1972), Washington (1973), Portland (1974), Rochester (1975), Memphis (1976), Chicago (1980), Chicago (1984).
14. A judge of Ph.D. dissertations submitted to the AMA Doctoral Dissertation Competition, 1974, 1976, 1977, 1981, 1982, 1983. And the MSI Dissertation, and other award competitions 1984, 1985, 1990
15. Reviewer of papers submitted to the Market Measurement and Analysis Conference (renamed Marketing Science Conference) since 1981.
16. Occasional reviewer of applications for research grants for the Social Science Research Council

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(London, England) since 1972; and the National Science Foundation, Division of Science Information and Advanced Productivity Research and Technology, since 1977.

17. Reviewer of manuscripts for a number of publishers and universities, including the MacMillan Company, the Center for Research of the College of Business Administration of Pennsylvania State University, the Graduate School of Business, Columbia University, Prentice Hall, Jose Bass and others.

III. Offices Held in Professional Associations

AMA

1. Member of the Board of Directors, The Philadelphia Chapter of the AMA, 1979-1983.
2. Program Chairman of:
 - a) The 1977 AMA Doctoral Consortium Philadelphia, August 1977.
 - b) The 1975/1976 AMA Attitude Research Conference, Hilton Head, SC, February 1976.
 - c) The National Educators AMA Conference, Washington, D.C., August 1973.
3. Member of a number of AMA councils including the Advisory Council of the National Marketing Honorary Society of the AMA - Alpha Mu Alpha, 1980/1981 and the Educational Policy Council, 1977/1978.

TIMS

1. Chairman, 1974/1975; Chairman Elect, 1973/1974; and Vice Chairman, 1971/1972 of the Institute of Management Science College of Marketing.
2. Program Chairman of:
 - a) Marketing track on "Marketing Science for Increased Competitiveness of Firms and Countries," 1988 Washington, D.C., TIMS/ORSA Conference.
 - b) The 1981 Market Measurement and Analysis Conference (with Vijay Mahajan).
 - c) The Delaware Valley Chapter, 1967/1968.
3. Member of the Program Committees of the Market Measurement and Analysis Conference: University of Texas, 1980; New York University, 1981; and the Marketing Science Conference: University of Chicago, 1983; Vanderbilt University, 1985; University of Texas at Dallas, 1986; Centre HEC-ISA, Jouy-en-Josas, France, 1987; Washington University, 1988.
4. Member of the Advisory Board of Marketing Science, 1983-present.

IAM – The International Academy of Management

1. Chancellor, 2000-2006.
2. Vice Chancellor for the Americas, 1995-2000.
3. Program chairman, the Americas Conference, 1994, 1998.

MASB – Marketing Accountability Standards Board

1. Member of the Board of Directors since 2010.

MSI – Marketing Science Institute

1. Chair of a task force on e-business evaluation (part of the Metrics program), 1999.
2. Academic Trustee (1989-1995).
3. Member of the Academic Advisory Council (1983-1987).
4. Member of a number of steering groups, including
 - Marketing Strategies Steering Group, 1983-1987.
 - The International Advisory Steering Committee (1985-1987).
 - Information Technology Steering Committee (1990-1992).

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1. The Diebold Institute Entrepreneurship and Public Policy Project, Committee of Advisors (1999-__).
2. World Management Council. Member of the Academic Advisory Board (1988–1989).
3. Member of the interdisciplinary task force (organized by AMA) for the design of the *Journal of Consumer Research*, (October 1971–July 1972). Founding member of the Policy Board of the *Journal of Consumer Research* (1972–1983); Chairman of the Board (1977–1978); Chairman of the 1976 and 1981 Editor Search Committees.
4. Member of the Philadelphia's International City Steering Committee (1983–1985, 1987–1988).
5. Member of the Publication Committee of AAPOR (1973-1974).
6. Member of Program Committee of 1979 ACR Conference.
7. Member of the Advertising Research Foundation 75th Anniversary Convention Program Committee (2010)
8. ANA Talent (2016-present)
9. QS World University Rankings (2009-present)
10. Insights 2020 (2015-present)
11. Journal of Advertising Research, Editorial Review Board and Senior Advisory Board (2015-present)
12. Turner Ad Lab (2016-present)
13. Visual Domains (2016-present)

D. Planning and Organizing Professional Programs at the University

1. Empirical Generalizations in Advertising, December 2008; and Empirical Generalizations in Advertising II, "What works in the New Age of Advertising and Marketing," May 2012, with the Ehrenberg-Bass Institute for Marketing Science, University of South Australia
2. Advertising Effectiveness, with the Wharton Customer Analytics Initiative, May 2013.
3. Gaps in Measuring Advertising Effectiveness, with the Advertising Research Foundation, 2012-2013.
4. Chair, "Network-Based Strategies and Competencies," a joint project with INSEAD co-directed with Paul Kleindorfer, Initial Workshop, May 3, 2007. Conference, November 2007.
5. Chair, "The Future of Advertising," a joint project with the ARF, Workshop, March 30, 2007. Conference, December 2008.
6. Initiated and chaired a task force to develop a Marketing Certification Program (2003-2004)
7. Co-Designed with Bob Mittelstaedt an executive education program on "Wharton on the New Reality of Business," December 2001 [including the design of the "Wharton Post 9/11 Business Scenario" (October 2001-)] and May 2002.
8. Designed and directed the executive programs, "Winning in the Next Millennium," December 1998.
9. Initiated "The Impact of Computers and Information Technology on Management: 1946, 1996, 2001," May 13-14, 1996 program for the ENIAC at 50 celebration (1994-1995).
10. Initiated the "Computers and Art" program for the ENIAC at 50 celebration (1994-1995).
11. Participated in the original design of the Wharton – AT&T Marketing Management Program. Taught in the 1973, 1975 -1980 programs.
12. Developed, organized and taught a Marketing Research Seminar for U.P. Clinical Scholars Group (February–May 1975 and February–April 1976).
13. Planned and taught the marketing management section of a number of advanced management programs of the University of Pennsylvania:
 - Dean Witter - Wharton Account Executive Program, 1986.
 - Securities Industry Association Program, annually since 1982.
 - Advanced Management Program for Overseas Bankers, 1975, 1976.
 - Program for Health Care Executives, 1973, 1975, 1982.
14. Participated in various executive development programs of the Marketing Department of the University of Pennsylvania:
 - Marketing for the Postal Service, 1983.
 - Marketing Strategy Seminar, since 1981 (January & May).
 - Pharmaceutical Advertising Council, 1980/1981.
 - Wharton Salesforce Management Seminar, since 1980 (January & May).
 - Dixie/Marathon (American Can Company), May 1977.
 - Marketing Research Seminar 1977-1983.
 - General Building Contracting Association, Inc., January 1977.

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- Center de Promotion du Commerce International, Chambre de Commerce et d'Industrie de Nantes, 1976, 1978-1980.

15. Planned and taught (with Thomas Robertson) a number of seminars on Health Care Marketing for:

- The Virginia Hospital Association, February 1978.
- The New York Management Center, September and November 1977.
- The Wharton School's Lifelong Education Program, October 1976.

16. Co-founder, organizer of the Wharton teaching component, and frequent lecturer in the Wharton/Israel Binational Marketing Management Program [The Consulting Practicum] 1979-1995.

E. Award Committees

1. Member of the Sheth Award Committee to select the winning *Journal of Marketing* article that had the greatest long-term impact on the marketing discipline, 2009-2010
2. Member of the Parlin Board of Governors, 1978-1983, 1995-2008 ; Chairman of the Board, 1980/1981.
3. Member of the selection committee for MIT's Sloan Management Review/Price-Waterhouse Company, 2003 – Best Article Award.
4. Member of the "Global Marketing Scholar's Prize" Selection Committee, 2011, hosted by Korean Academy of Marketing Science
5. Nominator for the Marketing Communications Award of the World Technology Network, 2002-present
6. Initiator of the Lauder Institute Award for the Research Paper that Best Advances the Theory & Practice of International Management Science. Administered by TIMS and Chairman of the first award, 1989.
7. Member of the W. Arthur Cullman Executive Award Selection Committee (Ohio State University), 1985-1986
8. Member of a panel of judges for the evaluation of nominees for the Paul D. Converse Awards for Outstanding Contributions to the Development of Theory and Science in Marketing, 1974, 1977, 1981, and 1986.

F. Planning and Organizing Professional Programs Outside the University

1. KMDC Program, Kuala Lumpur, The Power of Impossible Thinking and Its Implications for Marketing Innovations, March 15-16, 2005.
2. Co-director (with Hotaka Katahira) of the Marunouchi Global Center Management Program, 2002.
3. Planned and taught a number of two-day seminars on "Recent Developments in Marketing Research Methodology" for:
 - The Management Center, University of Bradford, February 1975 and May 1976.
 - The University of Laval, Canada, November 1973.
 - The University of Social Sciences at Grenoble, France with (Paul E. Green), May 1973.
4. Planned and taught various AT&T Executive Development Seminars on:
 - "Multivariate Analysis in Marketing," March and August 1975.
 - "Market Analysis," December 1974, and June 1975.
 - "Market Segmentation," September 1974, November 1975 and March 1976.
 - "How to get the Most Out of Your Marketing Research," Spring 1974.
 - "Consumer Behavior," October 1972, January 1978.

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5. Planned and taught two one-day executive seminars on Conjoint Analysis and New Product Policy at the University of New South Wales (Australia), June 1977.
6. Planned and taught a number of executive seminars at the University of Tel Aviv: Marketing Strategy (1969); Product Policy (1977); Marketing and Corporate Strategy (1978, 1980); New Development in Product and Marketing Research (1980).
7. Planned and taught the marketing research section of the Bank Marketing Program of the Graduate School of Bank Marketing, April 1977.
8. Planned and taught a series of two-day seminars on Marketing Strategy for the New York Telephone Company, February and April 1976.
9. Initiated, planned and organized a number of two day workshops on:
 - Concept Testing, University of Pennsylvania, March 1972.
 - Industrial Buying Behavior (with Frederick E. Webster and Richard N. Cardozo), sponsored by the AMA & the University of California at Berkeley, April 1971.
 - Research Utilization, (with Steve Greyser and Randy Batsell), sponsored by the AMA and MSI, April 1979.
 - Advances and Applications in New Product Forecasting: Innovation Diffusion Models (with Vijay Mahajan) sponsored by MSI, October 1983.
10. Organizer and chairman of various sessions at annual conferences of various professional associations (illustrative list):
 - "Design Meets Marketing: Service Innovation by Design," Marketing Science Institute and Corporate Design Foundation Conference, Stanford University, October 17, 2007.
 - "Marketing science: Accomplishments and challenges in the global information age," plenary session at Informs, Philadelphia, November 1999.
 - "Consumer Labs," Marketing Science Conference, March 1997.
 - "Global Marketing Strategy," 1991 ORSA/TIMS Meeting
 - "Creation of Innovative Marketing Knowledge: An Interdisciplinary Perspective," 1989 AMA Marketing Educators Conference, August 1989.
 - "Strategic Alliances," TIMS Osaka, Japan, July 1989.
 - "Industrial and New Technologies Marketing: Lessons from Industry," International Research Seminar in Marketing, La Londe les Maures, France, May 1989.
 - "New Product Development Models," ORSA/TIMS, San Diego, October 1982.
 - "Product/Market Portfolio Models," ORSA/TIMS, Colorado Springs, November 1980.
 - "The Role of Multivariate Analysis in Consumer Research," APA, Toronto, 1978.
 - "Applications of Management Science to Market Segmentation," TIMS, Miami, 1976.
 - "Recent Developments in Management Science Application in Marketing," TIMS, Las Vegas, 1975.
 - "Multidimensional Scaling and Conjoint Measurement in the Study of Multidimensional Psychophysics," ACR, Boston 1973.
 - "Implementation of Management Science in Marketing," TIMS, Houston 1972.
 - "On the Teaching of Consumer Behavior," AMA, Houston, 1972.
 - "Family and Industrial Buying Behavior," AMA, Minneapolis, 1971.
 - "Multidimensional Scaling in the Study of Consumer Behavior," ACR, 1970.
11. Planned, organized and taught a Marketing Management Program for the top executives of the Union of Cooperative Societies (Israel), April to July 1969.
12. Planned and taught marketing courses at a Graduate Program for Marketing Consultants at the Israel Institute of Productivity, September 1968 to January 1969.
13. Academic advisor to a number of organizations engaged in Management Training in Israel. Primarily the Israel Institute of Productivity, and the Technion Research and Development Foundation Ltds., January to August 1969.

APPENDIX A**G. Presentations****A. Presented papers at various national conferences of the American Marketing Association**

December 1967; June and August 1968; August 1969; August 1970; June and August 1974; April and August 1975; August 1976; August 1977; June and August 1978; June and August 1979; June and August 1980; August 1981-1990, March 1990, August 1991; August 1991, April 1993; February & August 1994, August 1995, August 1996, August 1997, February 1998, August 1999.

B. Speaker in various conferences and workshops

- Association for Consumer Research (ACR), 1968, 1970/1973, 1975, 1977, 1984.
- The Institute of Management Science (TIMS), 1969, 1972, 1974-1978, 1980- .
- American Institute of Decision Sciences (AIDS), 1974, 1976.
- American Association of Public Opinion Research (AAPOR), 1974/1975.
- American Psychological Association (APA) DIV 23, 1978.
- American Statistical Association (ASA), 1978.
- AMA Philadelphia Chapter, 1980/1981.
- Annual Conference of the Strategic Management Society, 1984.
- Annual Conference of the Pharmaceutical Marketing Research Group (PMRG), 1986, 1987.
- Annual Conference of the World Future Society Assembly, Washington, D.C., 1993.

C. Speaker in a number of the AMA Attitude Research Conferences:

1967, 1971, 1973, 1976, 1987.

D. Member of the Faculty of the AMA Doctoral Consortiums

- University of Colorado, 1996
- University of Santa Clara, 1994
- University of Southern California, 1991
- New York University, 1987
- University of Notre Dame, 1986
- University of Michigan, 1983
- University of Minnesota, 1982
- Pennsylvania State University, 1980
- University of Maryland, 1981
- University of Wisconsin, 1979
- University of Chicago, 1978
- University of Pennsylvania, August 1977
- University of Texas, August 1976
- University of Illinois, September 1971

E. Member of the Faculty of the First Indian Doctoral Consortium, 2012**F. Member of the AMA Faculty Consortium, Chicago 1997****G. Illustrative papers delivered in various professional workshops**

- Applications of Multidimensional Scaling to Marketing and Business, sponsored by the University of Pennsylvania and Bell Laboratories, June 1972.
- Planning Data for STI Managers, Sponsored by NSF office of Science and Information, December 1976.
- Synthesis of Knowledge of Consumer Behavior, sponsored by the RANN Program National Science Foundation, April 1975.
- Multinational Product Management, sponsored by the Marketing Science Institute and the AMA International Marketing Division, January 1976.
- Consumer and Industrial Buying Behavior, sponsored by the University of South Carolina, March 1976.
- Organizational Buying Behavior, sponsored by the University of Pittsburgh, April 1976.

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- Consumer Research for Consumer Policy, sponsored by the MIT Center for Policy Alternatives, July 1977.
- Analytical Approach to Product-Marketing Planning, sponsored by the AMA and MSI, University of Pittsburgh, November 1977, October 1981.
- Interfaces Between Marketing and Economics, sponsored by the University of Rochester, 1978, 1983.
- Industrial Marketing, Penn State University, May 1982.
- Market Measurement and Analysis, renamed Marketing Science Conference sponsored by ORSA/TIMS:
 - Centre HEC-ISA, Jouy-en-Josas, France, 1987.
 - University of Texas at Dallas, 1986
 - Vanderbilt University, 1985
 - University of Chicago, 1984
 - University of Southern California, 1983
 - Wharton, March 1982
 - New York University, March 1981
 - University of Texas, Austin, March 1980
 - Stanford University, March 1979

H. Illustrative addresses at various top management conferences and meetings

- Moderator of Key Issue Forum on Social Media and Brand Opportunities, ARF Re:think Conference, New York, NY, March 23, 2010
- "Moving From Me to We: The New Competitive Edge," Milken Global Conference, Los Angeles, April 28, 2008.
- "The Wisdom of Crowds in Today's Digital World: We vs. Me," Milken Global Conference, Los Angeles, April 23, 2007.
- "Innovation," Telenet Top Executive Strategic Workshop, June 19, 2006.
- "The 1st Mover Advantage Challenge," Telenet Top Executive Strategic Workshop, June 19, 2006.
- "Getting More with Less," Telenet CEO Strategy Review, June 19-20, 2006.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "Brand Names and Logos," Penn Humanities Forum on Word and Image, February 2006.
- "New Frontiers in the Practice of Management: Toward a New Theory of the Firm" with Paul Kleindorfer, CEO Workshops at IDC Israel, January 27, 2006.
- "Strategic Trends on the Global Marketplace," The Sixth Herzliya Conference on The Balance of Israel's National Security, January 2006.
- "Recent Developments in Marketing and Branding Strategies," presented to the Board and top management of IDT HK, August 2005.
- "Tapping Opportunity in the Developing World: Innovative Solutions for Companies and Communities," Milken Institute Global Conference, April 2005.
- "Return on Marketing Investment: Progress, Problem, and Prospects," Council of Marketing Executives, The Conference Board, October 6, 2004.
- "The Power of Impossible Thinking: A Prerequisite for Profitable Growth," Milken Institute Global Conference, April 27, 2004.
- "The Transformation Challenge," YPO at SEI, March 2004.
- "Technology for Profitable Growth: Progress, Problems, and Prosperity, eBRC Board of Directors meeting, Philadelphia, May 2003.
- "Business and the Pending Wars," a global senior executive Web conference, February 2003.
- "e-Business Revolution: R2R (Return to Reality)," World Leadership Forum of the Foreign Policy Association, New York, September 2000.
- "UNIG Top Executive Forum," Singapore, August 2000.
- "The Future of the Marketing Organization," MSI Board of Trustees Meeting, April 27-28, 2000.
- "Preparing for 2002: Creating a Leading Global Medical Communication Company for the 21st Century," Top Management of Medius Group Int. Paris, May 1997.
- "The Next Enterprise: Creating a Successful 21st Century Enterprise," The Hong Kong Management Association, January 1996.

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- "Building the 21st Century Corporation Today: A Marketing Perspective," A one day session for CEOs who participate in the MASTERSHIP program (LA) January 1990.
- "Growth Outlook for Consumer Products and Services" to the policy committee of Anheuser-Busch Company, 1986.
- "Marketing Management in Securities Firms" SIA Regional conference, 1986.
- "Recent Developments in Marketing Strategy," to Dutch top executives by Horringa & DeKoning, October 1986.
- A number of 1-day Top Management Seminars organized by Studio Ambrosetti (Italy)
 - Developing and Launching New Products (1986)
 - Marketing and Corporate Strategy (1987)
 - Marketing for Financial Institutions (1987)
 - Domestic and International New Business Entry Strategies 1988)
 - Strategic Marketing and New Product Development (1989)
 - How to Develop Products More Often and Get Them to Market Faster (1991)
 - The Consumer Goods Scenario: The Challenge (1992)
 - Marketing Driven Bus Strategy in the Global Information Age (2000)
- "The Challenge of Marketing" Board of directors and top management of Grand Metropolitan, 1985.
- "Advances in marketing and Business Strategies" Top management group of the John Fluke Manufacture Co., 1985.
- "Global Marketing Strategies" YPO Chapter of Hong Kong, 1985.
- "Marketing for Hospitals" Hospital presidents program of the J&J Leonard Davis Institute program, 1985.
- "Global Marketing Strategies" Top executive group of MARS pet food business, 1984.
- "Marketing for the Evolving Company" Conference on "Financing & Managing the Evolving Company" sponsored by Arthur Andersen & Co. and the GSB University of Texas at Austin, April 1984.

I. Illustrative Other Top Management groups addressed

- MSI Trustees, Cambridge, Massachusetts, October 1983.
- Securities Industry Association Fall Meeting, N.Y., October 1982, Spring Meeting, April 2000, Homestead, Virginia, May 1982: keynote speaker.
- Three sessions at the 1979 YPO Central Area Conference, Williamsburg, October 1979.
- Two sessions at the YPO International University, Rio de Janeiro, May 1979.
- Two sessions at the 1978 YPO, Eastern/Northeastern Area Conference, Sea Island, Georgia, November 1978.
- Eastern Pennsylvania Chapter of YPO, October 1978.
- Two-day seminars for top executives of Latin American countries sponsored by Expansion Publishing Group, Mexico City, June 1978, (Marketing Strategy); June 1979 (the Marketing Audit); and December 1980 (Marketing for Top Executives).
- Bell Laboratories (Applied Statistics Area), 1978

J. Guest lecturer at faculty research seminars and executive development programs of various universities and research institutes including:

- Columbia University, 1974, 1976-1978
- Drexel University, 1977, 1984
- Erasmus University, The Netherlands, 1993
- Escola de Administrao de Empresas de Sao Paulo, Brazil, 1979
- European Institute for Advanced Studies in Management, Brussels 1981
- Florida Atlantic University, 1972
- Harvard University, 1981
- IESE Universidad de Navarra, 1999
- Indian Institute of Technology (IIT) Bombay, 1989
- INSEAD, France, 1992, 2000
- Institut Supérieur des Sciences Economiques et Commerciales, Paris, 1981
- Interdisciplinary Center Herzliya, 1996, 1997, 1998, 1999, 2000

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- Kōc University, Turkey, 2000
- Laval University, Canada, 1973
- Katholieke Universiteit, Leuven, 2001
- Monash University, Australia, 1977
- Nanzan University, Nagoya, Japan, 1977
- New York University, 1979, 1984
- Northwestern University, 1980
- Norwegian School of Management, Norway, 1993
- Pennsylvania State University, 1978
- Southern Methodist University, Texas, 1982, 1984, 1986
- Stanford University, 1976, 1982
- State University of New York at Buffalo, 1975
- University of Bradford, 1975-1976
- University of California at Berkeley, 1975
- University of California at Los Angeles, 1976, 1980, 1990
- University of Capetown, S.A., 1982
- University of Chicago, 1981
- University of Groningen, 1986
- University of Houston, 1977
- University of Illinois, 1985
- University of Iowa, 1971
- University of Minnesota, 1973
- University of New South Wales, Australia, 1977
- University of Ottawa, 1974
- University of Pittsburgh, 1988
- University of Social Sciences, Grenoble, France, 1973
- University of Southern California, 1979
- University of Tel Aviv, 1977-1980, 1982
- University of Texas at Austin, 1984, 1997
- University of Tokyo, Japan, 1992, 1993, 1995, 1997
- University of Washington, 1979
- Yale University, 1982

K. Speaker at various local and regional meetings

of the American Marketing Association, 1967 to present, and national meetings of other marketing associations such as the National Account Marketing Association, 1973; the International Pharmaceutical Marketing Research Group, 1973; The National Association of Children's Hospitals and Related Institutions, 1976; American Management Association's advanced Marketing Research Seminars, 1967/1968; and the Marketing Science Institute conferences and management seminars, 1968-1994.

L. Guest speaker at special seminars

- The Australia and New Zealand Marketing Societies in Sydney and Melbourne, June 1977.
- "New Developments in Social Research," in the Symposium on Corporate Awareness, February 1977.
- The 11th Annual "New Horizons in Science," Conference of the Council for the Advancement of Science Writing, New York, November 1973.
- Various conferences of the Israel Advertisers' Association, The Technion Research and Development Foundation, Ltd., The Ministry of commerce and Industry, 1968/1969.
- Foreign market entry and import protection strategies, The Israel Institute of Management, October 1984.

APPENDIX A**M. Monthly Co-Host of *Marketing Matters*, weekly radio show airing on Sirius XM Channel 111, Business Radio Powered by the Wharton School**

- “A Commercial Show with Football Breaks: Super Bowl Advertising,” February 5, 2014
- “You May Also Like This Radio Show: Native Advertising, Sponsored Content, and Transparency,” March 5, 2014
- “The Billboard Looks Also Into You: The Future of Out-Of-Home Advertising,” April 2, 2014
- “Overcoming Audience Indifference, with the Most Interesting Man in the World,” April 30, 2014
- “Storytelling in the Digital Age: How to Make it Work,” May 14, 2014
- “Live from France with Awards Jurors from the Cannes Lions Festival,” June 18, 2014
- “World Cup Soccer and Playing Well With Fans,” July 16, 2014
- “Ads in Pockets: The Future of Mobile,” September 3, 2014
- “Ad Week, and the 64 Weeks After: Looking to 2015,” October 1, 2014
- “Xmas & AmEx & Small Business Saturday,” November 19, 2014
- “Marketing Management Matters with the Forbes CMO Network,” January 21, 2015

H. Presentations: Illustrative Topics**1) Creativity and Innovation**

- “Storytelling/Creativity for the Post-Pandemic Era with Nick Primola,” ANA’s Marketing Global Day of Learning, September 14, 2021
- “The Open Innovation and Open Talent Frontier For the PMA”, PMA Public Space Committee, April 14, 2021.

- “Preparing for a Paradigm Shift: Inspiring Innovation in your Classroom,” Reimagine Education Conference Innovation Workshop, December 8, 2020.

- “Rethink Innovation,” Net Elixir’s Executive Workshop at Grounds for Sculpture, September 20, 2019.
- “Rise Action Learning: Innovating for the Future,” United Airlines, January 10, 2019.

- “Reimagine B2B Marketing: Building Your Own Action Agenda,” Penn State ISBM Big Talk, September 20, 2017.
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron*,” PCI IT Conference, April 4, 2017.
- “Creativity & Lessons from Art,” Global CEO Program: A Transformational Journey, March 12, 2017.

- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron*,” Accessories Council, October 21, 2016.
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron*,” Global Executive MBA, June 24, 2016.
- “The Power of Art: A New Dimension of National Strength,” The 16th Annual Herzliya Conference, June 15, 2016.
- “Innovation By Legacy Firms,” SEI Senior Leadership Strategy Program, May 23, 2016.
- “Reimagine the MBA,” AACSB 2016 Redesigning the MBA: A Curriculum Conference, May 10, 2016.
- “Innovation By Legacy Firms Does Not Have To Be An Oxymoron,” The Wharton Club of Washington, April 26, 2016.
- “Creativity & Lessons from Art,” Global CEO Program, March 13, 2016.

- “New Business Models: Challenges & Opportunities,” Mack Institute Program, November 20, 2015.
- “Capturing Your Imagination: Building a Creative Organization,” Arts & Business Council, Creative Xchange, October 28, 2015.
- “Creativity & Lessons from Art,” Global CEO Program, March 10, 2015.

- “Tools for Bringing Creativity and Innovation to Your Client Interactions,” KPMG Global Insurance Academy & KPMG Global Banking Academy, December 1, 2014.
- “Creativity & Innovation: The Power of Impossible Thinking,” Lubrizol, October 16, 2014.

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- "Should You and Can You Inspire Curiosity," TEDx, Free Library of Philadelphia, September 17, 2014.
- "Creating a Creative Organization," Cannes CEO Academy, June 18-19, 2014.
- "Ten Guidelines for Successful Innovation," IDC's CEO Forum, June 10, 2014.
- "How to Ignite Creativity in Your Entire Organization," Cannes Lions Workshop, June 17, 2014.
- "Building and Leading a Creative Organization," Washington DC Innovaiton Summit, April 29, 2014.
- "Improv and Other Creativity Enhancing Approaches for Survival and Growth," University of the Arts, March 27, 2014.
- "New Audience Initiative," America's Orchestral Academy, New World Symphony, DATE, 2014.
-
- "Creativity & Innovation Problem, Prospects," SEI Growth Forum, May 25, 2013.
- "Enhancing Your Personal Creativity," The Academy of University of Pennsylvania, July 9, 2013.
-
- "The ROI of Creatives," Cannes Lions International Festival of Creativity, June 19, 2012.
- "Ten Guidelines for Creating a Creative Organization," Arts & Business Council Panel: How to Develop and Nurture Creativity in the Work Place, 2012.
-
- "Rethinking Your Innovation and NPD Strategies," IDC's CEO Forum, May 24, 2011.
-
- "Personal Power and Influence," July 14, 2010.
- "Innovation in Retailing: Progress, Problems and Prospects", Discussion at the Jay H. Baker Retailing Center, October 28, 2010.
-
- "Marketing Innovation: Reinventing Your Marketing and New Product Launch," Marketing Management Program, MA Industries, IDC, November 23, 2009.
-
- "Selling Scents: Innovative Approaches to the Age Old Selling Challenge in a Flat World of Empowered Consumers," The Fragrance Foundation Conference, March 12, 2008.
-
- "Advances in New Product Development and Innovation," Mutual Art Lecture Series, November 2, 2007.
- "The Creative Economy: Art and Culture at Penn and in Philadelphia," Penn Arts Leadership Conference, May 9, 2007.
-
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
-
- "Innovation and Change in the Turbo-Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and the Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, May 2000.
- "Customerization: The New Management Challenge," The President's Forum of the Interdisciplinary Center in Herzliya, Israel, September 2000.
-
- "Innovation Strategy," New Product Development and Launch, April 1999.
-
- "Innovation and New Product Development," Tutorial at the 2nd International Workshop, Santiago, Chile, October 1996.
- "Innovative New Product and Service Development: Best Practice and Opportunities for Experimentation," The Israel-North America Business Conference, New York, October 1996.
- "Innovation in New Product Development: Best Practice in Research, Modeling and Applications," Presentation to the JMR Editorial Board on the Special issue, August 1996.
- "Creativity and Innovation: The Management Edge in the Technological Age," the First Wind Lecture at the Interdisciplinary Center for the Study of Business, Law and Technology (Israel), May 30, 1996.
- "Product Launch," Software Development and Marketing for Competitive Advantage, IC², The University of Texas Conference, March 20, 1996.

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- "JMR Special Issue on Innovation in New Product Development: Best Practice in Research, Modeling and Applications," *JMR* Editorial Board Meeting, San Francisco, August 7, 1994.
- "A New Approach for Estimating the Demand for Interactive TV Products and Services, Interactive Industry 2000: Market Research for the Interactive Television Business," July 28-29, 1994.
-
- "Determinants of New Product Success: Lessons from the U.S. and Japan," Faculty and Ph.D. students seminar at Erasmus University, June 10, 1993.
-
- "Issues and Advances in New Product Development and Management: A U.S. Perspective," Advanced Industrial Marketing Strategy Seminar, September 18, 1992.
- "New Product Development: Problems, Advances and Prospects," Wharton's Advanced Industrial Marketing Strategy, March 19, 1992.
-
- "How to Develop Products More Often and Get Them to Market Faster: Guidelines for Functional Management," Ambrosetti Group, Milan, Italy, May 9-10, 1991.
- "Inducing Creativity and Innovation in Large Bureaucracies: Lessons from Marketing," RGK 4th International Conference on Creativity and Innovative Management, August 8-10, 1991, Los Angeles, CA.
-
- "Globalization: Opportunities for Innovative Research and Modeling," UCLA, Los Angeles, CA, January 9, 1990.
-
- "Increasing the Effectiveness of Your New Product Development," Indian Institute of Technology, Bombay, India, November 1989.
- "Improving the Effectiveness of the Industrial New Product Development Process: Lessons from Industry – The AS 400 Case," 16th International Research Seminar in Marketing, La Londe les Maures, France, May 19, 1989.
- "Developing and Launching New Products: Costs, Risks, and Conditions for Success," Studio Ambrosetti, AF Marketing Group, May 16, 1989.
-
- "What a Difference a Difference Can Make," Amoco Fabrics and Fibers Co-Leadership Council, May 1988.
-
- "A Innovation Diffusion and New Product Forecasting," TIMS Conference, November 1984.
- "The contribution of Research to Product Management and New Product Development," The 1983 ESOMAR Congress, Barcelona, August 1983.
- The First Delaware Valley Meeting of the Product Development and Management Association (PDMA), December 1980.

2) Challenging your Mental Models

- "The Power of Impossible Thinking at the Philadelphia Museum of Art: Inspiration and Lessons from Art," Lubrizol Executive Leadership Development Program, June 18, 2018.
- "Competitive Disruptors and Opportunities," Vanguard Officers' Offsite, April 26, 2018.
- "Guidelines for Turning Ad Avoiders Around," AdAvoidance x Science: ARF Tackle Resistance Across Platforms, April 19, 2018.
- "Challenging our Mental Models and Business Models and Their Implications," Li & Fung Top Management Retreat, January 12-14, 2018.
-
- "Challenging and Changing Your Mental Models." Hero Motor Corp: The iLead Senior Leadership Development Program, November 29, 2017.
- "Challenging Your Mental Models and Toward a New Marketing Paradigm: Implications for Action," Takeda Pharmaceuticals: Marketing Program, November 27, 2017.
- "Fung Retailing Group: Conversations with Professor Jerry Wind," Li & Fung Top Management Meeting, February 26-27, 2017.
- "Challenging our Mental and Business Models and their Implications," Idealized Design Workshop, January 13-14, 2017.

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- “IDC: Visions and Actions for the Next Decade,” Idealized Design Workshop, December 17-18, 2017.
- “PAFA 2022: Visions and Actions,” PAFA Board Meeting, December 14, 2017.
- “Challenging Your Mental Models,” Hero Motor Corp – The iLead Senior Leadership Development Program, November 29, 2017.
- “Challenging Your Mental Models and Toward a New Marketing Paradigm: Implications and Actions,” Takeda Pharmaceuticals: Marketing Program, November 27, 2017.
- “Architecture of Disruption: The Changing Role of the CXO,” Knowledge@Wharton Board Meeting: The Architecture of Disruption, November 16-18, 2017.
- “Challenging Your Mental Models,” Merck Marketing Program, November 25, 2017.
- “Challenging Your Mental Models,” Comcast Women in Leadership Program, October 25, 2017.
- “Challenging Your Mental Models,” Merck Marketing Program, October 23, 2017.
- “Reimagine Knowledge@Wharton: Idealized Design Workshop (2),” Knowledge@Wharton, October 22, 2017.
- “Challenging Your Mental Models and Toward (a) New Marketing and (b) Insight Paradigms: Implications and Actions,” Vertex Portfolio Leadership Program, October 18, 2017.
- “Challenging Your Mental Models,” Merck: Marketing Program, October 10, 2017.
- “Challenging Your Mental Models,” Merck: Marketing Program, September 28, 2017.
- “Challenging Your Mental Models,” Bureau Veritas, July 18, 2017.
- “Challenging Your Mental Models,” Merck: Marketing Program, July 17, 2017.
- “Challenging Your Mental Models,” Nanjing Sample Tech Strategic Leadership Program, July 12, 2017.
- “Challenging Your Mental Models,” Comcast Women in Leadership Program, June 21, 2017.
- “The Power of Impossible Thinking,” Global CEO Program, March 13, 2017.
- “Challenging Your Mental Models.” McKesson Health Solutions Product Management Program, March 7, 2017.

- “Challenging Your Mental Models and Toward New Marketing and Paradigm: Implications & Actions,” Vertex Portfolio Leadership Program, November 30, 2016.
- “Challenging and Changing Your Mental Models,” Hero Motor Corp: The iLead Senior Leadership Development Program, November 29, 2016.
- “The Power of Impossible Thinking: Challenge Your Business and Mental Models,” LinKS at Wharton, November 1, 2016.
- “Challenging and Changing Mental Models,” IDC at Wharton, October 31, 2016.
- “The Power of Impossible Thinking: Challenge Your Business and Mental Models,” PVH Global Leadership Program, September 27, 2016.
- “The Power of Impossible Thinking,” Lubrizol Executive Development Leadership Program, May 25, 2016.
- “Challenge your Mental Models,” SEI Senior Strategy Program, May 9, 2016.
- “Challenge Your Mental Models Implications & Actions,” MedStar Leader of the Future: Accelerated Leadership Program, April 27, 2016.
- “Challenge Your Mental Models Implications & Actions,” Estee Lauder Brand Leadership Program, March 14, 2016.
- “Challenge Your Mental Models Implications & Actions,” Global CEO Program, March 14, 2016.
- “Mental Models Towards a New Marketing Paradigm: Implications & Actions,” Vertex Portfolio Leadership Program, February 3, 2016.

- “Challenging Your Mental Models,” Comcast Women in Leadership Program, November 11, 2015.
- “Challenging Your Mental Models,” US Trust - Executive Performance Leadership Program, November 3, 2015.
- “Challenging Your Mental Models,” Sumitomo Mitsui Banking Corporation, Global Leadership Program, October 26, 2015.
- “Challenging Your Mental Models,” Estee Lauder HR Program, October 20, 2015.
- “Challenging Your Mental Models,” IDC, Philadelphia, October 12, 2015.
- “The Power of Impossible Thinking,” PVH Global Leadership Program, September 29, 2015.
- “Challenging the Mental Models of an Industry: The Case of the Future of Advertising,” Education Entrepreneurship, Penn GSE, July 23, 2015.

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- “Challenge Your Mental Models,” Education Entrepreneurship, Penn GSE, July 23, 2015.
- “Challenging Your Mental Models: A Necessary Condition for Creativity and for Staying Ahead of the Curve” Accessory Council, April 25, 2015.
- “Challenging Your Mental Models,” Estee Lauder, April 14, 2015.

- “Challenging and Changing Your Mental Models,” IDC Herzliya Arison School of Business, October 20, 2014.
- “Challenging Your Mental Models,” Estee Lauder, April 2, 2014.

- “Challenging Your Mental Models,” Estee Lauder, February 28, 2013.

- “Challenges and guidelines for building learning effectiveness,” 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 29, 2012.
- “Challenging Your Mental, Business and Revenue Models,” Wharton Alumni Club – Beijing, July 25, 2012.
- “Challenging Your Mental, Business and Revenue Models,” Wharton Alumni Club – HK, July 20, 2012.
- “Challenging Your Mental Models,” SEI Trust Company Operations, July 16, 2012.
- “Challenging Your Mental Models,” Israel Police Senior Management Program, June 11, 2012.

- “Challenging Your Mental Models in the Age of Empowered Consumers and Networks,” SEI Executive Network, November 2, 2011.
- “Challenging Your Mental Models,” Estée Lauder Companies Global Marketing Symposium, November 1, 2011.
- “Challenging Your B2B Mental Models,” Google’s Think B2B: Deconstructing Today’s B2B Customers, October 6, 2011.
- “The Power of Impossible Thinking,” Austria Connect, September 9, 2011.
- “Challenging Your Mental Models,” NESS Executive Session and IDC, May 23, 2011.
- “Challenging Your Mental Models,” Perry Ellis Session, May 17, 2011.
- “Should We Challenge Our Mental Models of Creative?” FoA Future of Creatives and Creative Ideas in a Digital World, March 18, 2011.

- “Challenging Your Mental Models,” Tyco Electronics Leadership Development Program @ Wharton, Novmber 16, 2010.
- “Challenging Your Mental Models,” Discount Bank, Israel, May 25, 2010.
- “Challenging Your Mental Models,” Mellanox Technologies, Israel, May 25, 2010.

- “Challenging Our Mental Models,” Jay H Baker Advisory Board Meeting, November 30, 2009.
- “Challenging the Mental Models of Top Management,” IDC’s CEO Forum, November 19, 2009.
- “Challenging Your Mental Models,” Wharton Combined Boards Meetings, October 23, 2009.
- “Challenging Your Mental Models,” Partner, June 2, 2009.

- “The Power of Impossible Thinking,” Alumni Leadership Conference, May 24, 2007.

- “The Power of Impossible Thinking: Implications for OD,” Organizational Development Network of Greater NYC, October 17, 2006.
- “Should the Alumni Leadership Challenge their Mental Models?” Alumni Leadership Conference, October 14, 2006.
- “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006.

- “Wharton School Publishing and the Power of Impossible Thinking,” Presentation to the Board of the Jay H. Baker Retailing Initiative, October 6, 2005.
- “The Power of Impossible Thinking,” Opening Session: Transform Your Business with New Thinking and New Models, The 51st Annual ARF Convention, Research Powered Marketing: New Models for Growth, April 2005.

- “The Power of Impossible Thinking in Meeting the Jim Stargel Challenge,” ARF Breakthrough

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Conference, November 4, 2004.

- “Challenging Your Mental Models: And Their Implications for Innovation in Marketing Strategy,” KPMG Global Insurance Institute, December 2003 and November 2004.

- “Disruptive Technology—Rethinking Your Mental Models,” Forbes Global CEO Conference, Singapore, September 2001.

3) Growth and Transformation

- “Transformation in Times of Crisis,” IAM Global Forum, October 15, 2021.
- “Learning and Thriving in the New Normal,” iFEST, August 31, 2021.
- “Transformation in Times of Crisis with Nitin Rakesh,” Plaksha University, July 9, 2021.
- “Transformation in Times of Crisis,” NetElixir, Connecting the Dots: Driving Change Through Innovation, June 10, 2021.
- “Transformation in Times of Crisis with Nitin Rakesh,” CEO Trust, April 13, 2021.
- “Opportunities in Times of Crisis: Changing the Role of the CMO with Nick Primola,” IDC MBA, April 6, 2021.
- “Transformation in Times of Crisis with Nitin Rakesh,” Mphasis Client Event, March 31, 2021.
- “Transformation in Times of Crisis with Nitin Rakesh, Shelly Swanback, and Alan Murray,” Horasis Extraordinary Meeting on the USA: Rebuilding Trust, March 18, 2021.
- “Transformation in Times of Crisis with Nitin Rakesh,” IIT Gandhinagar, March 17, 2021.
- “Transformation in Times of Crisis with Nitin Rakesh,” HBS Club of NY, March 2, 2021.
- “*Transformation in Times of Crisis* Round Table Europe Launch with Nitin Rakesh,” General Public (European), February 5, 2021.

- “*Transformation in Times of Crisis* Book Launch with Nitin Rakesh, Phil Kotler,” General Public, December 3, 2020.
- “Marketing’s Role in Creating Opportunities in Times of Crisis,” World Marketing Summit International 2020, November 6, 2020.
- “Opportunities in Times of Crisis,” Slalom Fellows, July 14, 2020.
- “Creating Opportunities in a Time of Crisis,” Wharton Executive Education: Wharton Ready Livecast Series, June 23, 2020.
- “Opportunities in Times of Crisis,” NetElixir, June 5, 2020.
- “Creating Opportunities in a Time of Crisis,” SEI: RIA Advisor Community, May 5, 2020.
- “Creating Opportunities in a Time of Crisis - Follow Up,” Leaders of Design Council: Thought Leadership Series, May 1, 2020.
- “Creating Opportunities in a Time of Crisis,” SEI: Advisor Network Explorers, April 17, 2020.
- “Creating Opportunities in a Time of Crisis,” Wharton Marketing Faculty and Doctoral Students: Friday Happy Hour, April 10, 2020.
- “Creating Opportunities in a Time of Crisis,” Leaders of Design Council: Thought Leadership Series, April 10, 2020.

- “The Talent Challenge of Digital Transformation,” Best Practice Institute, December 5, 2019.
- “The Architecture of Disruption,” The Leadership of East Spring Investments, NUS and NUHS, The National Gallery at the National Gallery of Singapore, September 25, 2019.
- “Strategic Diversification Outside of Greater China,” 2019 Fung Retailing Group Advisory Board Meeting, September 22-24, 2019.
- “The Latest Retail Technology or How to Get the Most Out of Your Retail Technology Investment,” with Richard Yeung, CEO of Convenience Retail Asia Ltd., Fung Retailing, March 8, 2019.

- “The Architecture of Disruption: Conversation with Jerry Wind,” CEO Trust, September 21, 2018.

- “7 Guidelines for Profitable Growth Strategies in Turbulent Times,” NY Accessory Council Meeting, April 9, 2015.
- “Meeting the Challenges and Opportunities of the New Economy: And 8 Guidelines of the New Economy,” The Li & Fung & Fung Group President’s Forum, January 24, 2015.

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- “Growth Rules: Getting to \$2.50,” SEI Growth Forum, May 21, 2013.
- “The Changing Business Environment: Key Trends and Opportunities & Their Growth Implications for SEI,” SEI Management Meeting, May 3, 2012.
- “Growth, Interactive Marketing and Business Strategies in the Age of the Empowered Consumer,” Wharton Global Alumni Forum, June 24, 2011.
- “The Challenge of Ethical Leadership Lessons from ‘Inside Job’,” The Leadership in Film Series, April 20, 2011.
- “Perspectives on the Changing Economy,” AMA Session, February 20, 2010.
- “Profitable Growth Opportunities in times of Crisis and Rebirth,” Jay H Baker Advisory Board Meeting, November 30, 2009.
- “Opportunities in Times of Crisis,” SEI Center Annual Board Meeting, October 9, 2009.
- “Opportunities in Times of Crisis,” Baker Retailing Initiative, June 23, 2009.
- “Member Managed Relationship: Opportunities for Growth,” AAA Management Meeting, June 11, 2009.
- “Innovation and Creativity in Time of Crisis,” The Israeli Innovation Forum at IDC, May 31, 2009.
- “Leadership in a Changing World,” University of Monterrey Executive Leadership Across a Global Platform, October 3, 2008.
- “The Future of the Corporation Survey Results,” SEI Center Board Meeting, November 16, 2006.
- “How Should Directors Think About Directing?” The Governance Summit, October 27, 2005.
- “Barcelona 2020: Strategic Options and Action Plans,” The Barcelona Group Philadelphia Meeting, July 18, 2005.
- “Decision Aiding Technologies and the New Theory of the Firm,” with Paul Kleindorfer, Mack Center for Technological Innovation Conference on Using Technology to Improve Decision Making, May 27, 2005.
- “The Silver Lining: Seeing Opportunities in Risk,” Recent Advances in Operations and Risk Management Conference in Honor of Paul Kleindorfer, May 5, 2005.
- “The Challenge of Corporate Governance,” IAM Conference, Barcelona, Fall 2003.
- “Corporate Transformation: Lessons for Japan,” Marunouchi Global Center First Executive Program, November 2002.
- “Leading Transformation Lessons for Mexico,” TeleTech’s Top Executive Program, October 2002.
- “Wharton on the New Reality of Business: Insights from Our Experience,” presentation with Robert Mittelstaedt to the Wharton Combined Boards, March 8, 2002.
- “Capturing Opportunities in the Post 9/11 Reality,” The Wharton Club of Israel, December 2001.
- “What Keeps Us Up At Night?: Post 9/11 Survey of US CEOs – Top Line Results,” SEI Center Board, October 2001.
- “Capturing Internet Opportunities Above the Low-Hanging Fruit,” Business Week “Rethinking the Internet,” Conference, Chicago, October 2001.
- “Making Strategy Happen: Problems, Progress and Proposed Actions for Winning in the Changing Global Information Age,” Li & Fung Distribution Annual Conference, Hong Kong, July 2001.
- “Globalization of Technology Startups,” Wharton-Israel Global Alumni Conference on the Globalization of Technology Intensive Business, March 2001.
- “The e-Bus Challenge,” the Top Executives of the Bank of East Asia, March 2001.
- “Developing a Strategy,” ICA Board, March 2001.
- “e-Business: The Lessons to Date and Implication to Management Practice, Research and Education,” opening lecture of the PricewaterhouseCoopers Management Consultants e-Bus Chair at the Graduate School of Business Studies at Katholieke Universiteit Leuven, Belgium, February 2001.

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- "Driving Change: New Business Models for the Global Digital Age," Opening Lecture of the PricewaterhouseCoopers Management Consultants, e-Business Chair, Graduate School of Business Chair, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.

- "e-Transforming an 'Old Economy' Business," Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- "Creating an e-Business," Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- "Preparing for Leadership in the Changing e-Business Environment," CEO Circle, May 2000.
- "Preparing for Leadership in the Changing e-Business Environment," CEO Circle, May 2000.
- "Building Communities," Virtual Communities and the Internet, April 2000.
- "Valuation: Valuable or Value Less," Entering the Virtual Millennium, Wharton North American Regional Forum, April 2000.
- "Customization Strategies for Financial Services in the Global Information Age," the Citigroup and Simon Graduate School conference on Electronic Banking Commerce, New York. February 17-18, 2000.
- "Emerging Trends in the Pharmaceutical Industry and the Expected Scenarios," Innovative Managed Care Contracting, January 2000.

- "Winning the High Tech Wars: Strategies for Driving Change," NEC Management Team, Tokyo, April 1998.
- "The Challenge of Market Leadership," Bristol-Myers Squibb Medical Devices Group, January 1998.

- "Driving Change: Preparing for the 21st Century," Business Writers Seminar, December 1997.
- "Preemptive Strategies," Wharton Executive Education Competitive Marketing Strategies, June 1997.
- "Toward a New Corporate Governance Model: Lessons from the Japanese and U.S. Experience," With Masaru Yoshitomi, the Corporate Governance Workshop, March 1997.
- "Creating a Leading Global Medical Communication Company for the 21st Century," Medicus Group International, Inc., March 1997.

- "The Challenge of Competitive Strategies in the Global Information Age," The Interdisciplinary Center, Herzliya, Israel, December 1996.
- "The Technology Challenges for Family Business," Technology Day: The Web, The Future and You, the 1996 Family Firm Institute Conference, October 1996.

- "Business in the Global Information Age," The Interdisciplinary Center of Business, Law and Technology, December 3, 1995.

- "AHP in Top Management Decisions," The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
- "Creating a 21st Century Enterprise," Poon Kam Kai Institute of Management, The University of Hong Kong, June 16, 1994.
- "Market Driven Quality," at the Beyond Quality: Organizational Transformation to the 21st Century Enterprise, March 17-18, 1994.

- "Getting the Most out of Benchmarking," Board of Directors of Wharton's Alumni Association, May 14, 1993.

- Executive Development 1992, 1993.
- "The Market Driven 21st Century Enterprise: Implications for Law Departments," Presentation at the SmithKline Beecham U.S. Law Department Conference on Customer Focus Continuous Improvement, April 28, 1992.
- "Preparing for the 21st Century Today," Securities Industry Institute, 40th Anniversary Program, March 1992.
- "The Successful 21st Century Enterprise as Customer Driven: Implications for Marketing and

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Management Science," University of Texas at Austin, Faculty Colloquium, February 1992.

- "Management in the 21st Century: Implications to the Fragrance Industry," Summit 2000 Conference of the Fragrance Association, April 8, 1991.
- "Research Priorities in the Information Technology Area," MSI, Information Technology Steering Group, January 18, 1990.
- "Building the 21st Century Corporation Today: A Marketing Perspective," MASTERSHIP, Los Angeles, January 9, 1990.
- "Management in the 21st Century: Implications for Management Research and Education," University of California, Irvine, April 27, 1989.
- "Foreign Market Entry and Import Protection Strategies," Israel Institute of Management, October 1984.
- "The CEO and the Board," Strategic Management Conference, October 1984.

4) Marketing and Branding

- "Marketing and Programs Working Group's Perspective for HSP's Strategic Plan," HSP Marketing and Programs Working Groups, June 9, 2021.
- "*Inside by TIME*: Changing the Role of the CMO," *Inside by TIME* Community, March 31, 2021.
- "The Purple Project for Democracy: Discussion Guidelines with Dr. Zusky's Brentwood Civic Leadership Class," Brentwood School Civic Leadership Class, October 7, 2019.
- "Digital Marketing: Insights from the Wharton Future of Advertising Program," LMC: Business Acumen Program, January 16, 2019.
- "Retail Technology and Marketing Trends: Conversation with Fung Retailing Board and Management," 2018 Fung Retailing Group Advisory Board Meeting, October 29-31, 2018.
- "Marketing in the Digital World: Lessons from the Future of Advertising," Merck: Advanced Digital Marketing Academy, The Wharton Future of Advertising Program, June 28, 2018.
- "First 100 Days of Digital Marketing," Aresty Institute – Digital Marketing Strategies for the Digital Economy, November 28, 2017.
- "Reimagine Knowledge@Wharton: The Reason for Winning the New Nobel Prize for Most Useful Business Resource (Parts 1&2)," Idealized Design Workshop, September 22, 2017.
- "Reimagine B2B Marketing: Building Your Own Action Agenda," Penn State Institute for the Study of Business Markets, September 20, 2017.
- "Digital Storytelling," Future of Advertising Program, September 13, 2017.
- "Reimagine B2B Marketing: Building Your Own Action Agenda," FOA Program, September 2, 2017.
- "First 100 Days of Digital Marketing," Digital Marketing Strategies for the Digital Economy, June 5, 2017.
- "Reimage Marketing: Implications for Knowledge@Wharton," Knowledge@Wharton Board Meeting, May 24, 2017.
- "Reimagine Marketing," Marketing Hall of Fame Induction Ceremony, May 11, 2017.
- "Reimagine Marketing," The Wroe Alderson Lecture, April 13, 2017.
- "The Challenge of Personalization," Lessons from the Future of Advertising Program, Amazon Outbound Marketing Summit, March 21, 2017.

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- “The Evolutionary (Disruptive?) Practice of Marketing,” J&J Global Marketing Summit, August 2, 2016.
- “The Five Forces of Change and their Implications to Marketing Capabilities,” Global Marketing Excellence Summit, May 5, 2016.
- “The New Age of Marketing,” Fung Retail Group Board Meeting Shanghai, March 30-31, 2016.
- “Designing an Idealized Marketing Function,” SEI Corporate Marketing Retreat, January 1, 2016.

- “Toward a New Marketing Paradigm: Implications for Action,” Vertex Portfolio Leadership Program, February 10, 2015.
- “The CMO Advantage: Evolving Beyond the Digital Revolution,” CMO Advantage, Penn Club of New York, February 6, 2015.

- “Towards a New Marketing Paradigm: Implications for Action,” Vertex/Wharton Program, November 19, 2014.
- “From Big Data to Smart Data,” Forbes CMO Next, November 5-7, 2014.
- “Coping With and Leveraging Disruptive Technologies,” Rocket Fuel Management Conference, May 13, 2014.
- “Samsung,” April 7, 2014.
- “Marketing in the Age of the Omnichannel Consumer,” The Estee Lauder Companies Global Marketing Symposium at Wharton, April 7, 2014.
- “Marketing and Business Models 2.0 for the UOB and the National Gallery,” Singapore, March 18, 2014.
- “The Omnichannel Challenge: Progress, Drivers, Problems, and Prospects,” Fung Retailing Group, February 18, 2014.

- “Strategic Review,” Estee Lauder North America Leadership Meeting, November 15, 2012.
- “Perspectives on Marketing Strategy and Financial Performance,” 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 28, 2012.
- “Assessing the ROI of Marketing Strategy,” 2012 Inaugural AIM-AMA Doctoral Consortium, July 28, 2012.
- “The Future of Retailing is Now,” Li & Fung Retailing Holding Co., July 23, 2012.
- “Client Experience and Engagement,” SEI Global Wealth Services Executive Network, May 15, 2012.
- “The Future of Branding and Intellectual Property in Marketing: The Challenge” Brands and Branding in Law, Accounting and Marketing Conference at UNC, April 13, 2012.
- “Rethinking Marketing in the Age of the Empowered Consumer,” Temple University Fox School of Business, March 16, 2012.

- “Conversations with MARS Catalyst & Marketing Lab, MARS, November 8, 2011.
- “Designing TV Commercials That Maximize Social Diffusion,” MARS, November 8, 2011.
- “The Myth of the Four-Minute Mile and its Implication to B2B Marketing,” Google’s Think B2B: Deconstructing Today’s B2B Customers, October 6, 2011.
- “Marketing and Business Strategy in the Age of the Empowered Consumer,” SEI Private Banking Executive Network, June 16, 2011.
- “Marketing and Business Strategy in the Age of the Empowered Consumer,” Wharton Fellows @ The Conference Board: Fellows Breakfast & Program, June 3, 2011.
- “MSI- The Philadelphia Story,” MSI 50th Anniversary, April 26, 2011.
- “Marketing Communication in the Digital Era,” MSI 50th Anniversary, April 26, 2011.
- “Marketing: What’s Next,” Wharton Fellows at the Conference Board: Philadelphia Master Class, January 22, 2011.
- “Accelerating & Improving GTM Strategies Via Effective Experimentation,” SEI Marketing Group Meeting, January 2011.
- “Marketing and Business Strategies in the Age of the Empowered Consumer,” The Wharton Club of London, February 15, 2011.

- “Getting the Most Out of Your Interactive Marketing Dollars,” Wharton Club of Southern California, November 18, 2010.

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- “7 Advertising Myths,” Wharton Alumni Webinar, April 22, 2010.
- “Revitalizing Brands and Reinventing Marketing,” SEI – Leumi Executive Meeting, December 14, 2010.
- “Go To Market Strategies 10 Interrelated Questions” SEI Marketing Leaders Workshop, November 9, 2010.
- “The Challenge of Customer Centricity”, GSK Executive Leadership, November 9, 2010.
- “Marketing Careers,” Wharton Marketing Conference, November 12, 2010.
- “Marketing of Israel,” Gratz College, May 6, 2010.
- “7 Advertising Myths,” M Factor, May 5, 2010.
- “Global Business Branding,” America-Israel Chamber of Commerce, April 14, 2010.
- “Marketing Implications of the Changing Economy,” AMA Winter Marketing Educators Conference, February 20, 2010.

- “Leveraging Social Media,” The Fox Chase Cancer Center Leadership, December 15, 2009.
- “Leveraging the PMA’s Marketing and Pricing Strategies,” A Discussion on Reverse Marketing for the PMA, July 20, 2009.
- “The Challenge of Marketing Israel,” Wharton Alumni Club of Pacific Palisades, July 8, 2009.
- “Marketing Strategy Discussion Guideline,” PhD Seminar, March 27, 2009.
- “Some Observations on the Changing Retail Scene,” The Wharton Retail Club Seminar on Industry Trends, March 18, 2009.
- “Can We Brand Our Customers and Not Our Products?” MPlanet Round Table, January 27, 2009.

- “Market Driven Strategy,” and “Integrated Global Marketing Strategy [in Times of Crisis],” Newell Rubbermaid Marketing Excellence Program, September 17 and 19, and December 10-11, 2008.

- “Rigor & Relevance: A Key Marketing Challenge,” The Buck Weaver Award Presentation, September 7, 2007.
- “Global Branding & Marketing,” TEVA Israel Leading Your Business, June 28, 2007.
- “The Wisdom of Crowds in Today’s Digital World We vs. Me,” Milken Global Conference, April 23, 2007.
- “Brand Names and Logos: Implications to Language Instruction,” Penn’s Language Faculty, March 22, 2007.

- “Customer Value: Strategies for the Long Term,” Marketing Precision Conference: The Value of Marketing, September 27, 2006.
- “Does Korean Marketing Need Reform?” Korean Marketing Club, Seoul, June 5, 2006.
- “Redefining Marketing for the 21st Century,” Wharton Club of Korea, Seoul, June 3, 2006.
- “Brand Names and Logos,” Penn Humanities Forum on Word and Image, February 2006.

- “Recent Developments in Marketing and Branding Strategies,” IDC Board of Directors Meeting, August 25, 2005.
- “Effective Marketing Planning: What It Is and How to Produce It,” JCCA Conference, April 2005.

- “Strategic Shifts and the Balance of National Security: Summation,” J. K. Herzliya Conference, Israel, December 2004.
- “Return on Marketing Investment: Progress, Problems and Prospects,” Address to the CMO Group of the conference board, October 6, 2004.
- “Challenges of Identifying, Developing, and Capturing Opportunities: A Fresh Look at Marketing,” SEI Center Board Meeting, October 1, 2004.
- “Challenging the Mental Models of Marketing,” A State of Marketing Symposium, Does Marketing Need Reform? Boston, August 9, 2004.
- “Should We Challenge Our Mental Models for Building Better Brands?” Med Ad News Conference on Building Better Brands, Philadelphia, July 28, 2004.

- “The Changing Nature of Marketing: Implications for Research, Teaching, and Practice,” The Elsevier Science Distinguished Scholar Award Lecture at the Society for Marketing Advances, New Orleans, November 6, 2003.

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- “The Interdisciplinary Challenge of Marketing,” Ph.D. Proseminar, February 2003.
- “Convergence Marketing: Strategies for Reaching the New Hybrid Consumers,” a Webcast at the University of Wisconsin Consortium for Global e-commerce, January 2003; and a Soundview Teleconference, May 2003.

- “Managing the Complexities of the Convergent and Multi-Channel Marketing,” CMO Summit, October 30, 2002.
- “Marketing Driven Strategies for Today’s Economy,” Alumni Presentation, May 10, 2002.
- “Pioneer and Late Entrants: Winning Strategies,” Viagra, Cardura, Darifenacin WWT Meeting, April 9, 2002.
- “The Interdisciplinary Challenge of Convergence Marketing,” Wharton Ph.D. Proseminar, March 8, 2002.
- “Marketing Driven Strategies in a Global Economy,” IBM’s Managing Director’s Executive Development Program, February 13, 2002.
- “Should You Have a Chief Marketing Officer?” January 2002.
- “Convergence Marketing: The Challenge for the On-Demand Era,” IBM’s 2002 WW Summit for the On-Demand Era, 2002.

- “Target Audience, Public Opinion and Foreign Policy – A Marketing Perspective,” Balance of National Strength and Security – The Herzliya Conference, December 2001.
- “The 5 Cs of Marketing: Capitalizing on the New Opportunities of Convergence Marketing,” The Wharton Club, Atlanta, GA, November 2001.
- “Advances in Customer Focused Marketing and Business Strategy: The 5 Cs of Convergence Marketing,” The International Academy of Management, Claremont Graduate University, November 2001.
- “Convergence Marketing: A New Marketing Strategy for the Global e-Business Environment,” The Wharton European Forum, May 2001.

- “Whither System Thinking: Will Taking a Marketing Perspective be an Oxymoron?,” Inaugural Conference of the Achoff Center for Advanced Systems Appraisal, September 2000.
- “New Marketing Rules for e-Business Success,” UNIG, Singapore, August 2000.
- “New Marketing Rules for the Global Information Age,” IBM Global Services Academic Conference, August 2000.
- “Marketing Driven Business Strategy in the Global Information Age,” Managing Change in the New Millennium, Wharton-Singapore Management University Conference, July 2000.
- “A New Marketing Paradigm for the Global e-Business Environment: A Catalyst for Bridging the Gaps,” Building Bridges & Broadening Perspectives: A Paradigm for the Next Millennium, 29th EMAC Conference, Rotterdam, May 2000.
- “Research Priorities in e-Commerce and Internet Marketing,” Web Consortium, Pennsylvania State University’s ISBM, March 2000.
- “Implications of the New e-Business Environment and Models for Management Research and Education,” International Academy of Management, Barcelona Meeting, March 2000.
- “Marketing Driven Business Strategy in the Global Information Age,” Studio Ambrosetti’s top executive seminar in Padova and Milan, March 2000.
- “New Trends in Marketing Research,” IDC, Herzliya, March 2000.
- “Digital Marketing: Towards a New Paradigm for the Global Information Age,” Faculty Session-INSEAD, France, June 2000.
- “The Future of the Marketing Organization,” The Future of the Marketing Organization, MSI Board of Trustees Meeting, Cambridge, Massachusetts, April 2000.

- “Towards a Research Agenda in E-Commerce and Internet Marketing,” AMA Educators’ Conference, San Francisco, August 1999.
- “Digital Marketing: Implication for the Future of Marketing Management Research and Research in Marketing,” plenary session presentation AMA Marketing in the 21st Century, San Francisco, August 1999.
- “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” PhD. And Faculty Seminar IESE Universidad de Navarra, Barcelona, March 8, 1999.

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- "Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective," Wharton Impact Conference, March 1999.
- "A Marketing Perspective on Communitarian Policies," The Communitarian Summit, Washington, D.C., February 28, 1999.

- "An Extended Marketing Perspective on Corporate Architecture for the 21st Century," Japan Marketing Association, World Marketing Conference, Tokyo, April 1998.
- "The Challenge of Customer-Driven Product and Service Customization," Senior management of Convatec, March 1998.
- "Towards a New Marketing Paradigm," AMA Winter Marketing Educators' Conference, February 1998.
- "Positioning and Segmentation in the Global Information Age," IMS Marketing Management Meeting, January 1998.

- Competitive Marketing Strategies, "Preemptive Strategies," 1997, 1998.
- "Market Segmentation in the Global Information Age," Wharton – IDC Program in Marketing Communications, December 7, 1997.
- "Integration of Marketing and other Business Functions: The Wharton Experience," AMA: 1997 Faculty Consortium B Chicago, August 1997.
- "Positioning and Segmentation Opportunities for Synergy and Growth," Cognizant Group's Marketing Council, July 1997.
- "Communicating and Marketing Your Excellence," Volunteer Committees of Art Museums - VCAM Conference, Philadelphia, April 1997.
- "The Challenge of Information Technology to Marketing and Retailing in the 21st Century," University of Tokyo, April 1997.
- "Marketing Strategy in the Global Information Age: Implications for Modeling and Research," Ph.D. Proseminar, February 28, 1997.

- "Marketing: The State of the Art," Conference of the 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
- "Creating a 21st Century Enterprise: Implications for Marketing Practice, Research and Education," Keynote Address, 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
- "Marketing Strategy in the Global Information Age: Implications for Research and Modeling," AMA 1996 Doctoral Consortium, July 1996.
- "Segmentation in the Global Information Age: Accomplishments, Problems and Challenges," The 1996 Converse Award Presentation, May 7, 1996.
- "Advances in Marketing," Janssen Pharmaceutica, April 18, 1996.

- "Marketing Issue in the Global Economy," Wharton Doctoral Consortium, August 11, 1995.
- "A View of Marketing Through the Prism of the 1977 and 1995 Doctoral Consortia," Wharton School, Doctoral Consortium, August 8, 1995.
- "Toward a New Marketing Paradigm," Ambrosetti Group's A.F. Meeting (Rome, Italy), March 8, 1995.
- "Toward a New Marketing Paradigm: Lessons From and Implications to the Marketing of Services," Ambrosetti Group's Chief Executive Seminar (Milan, Italy), March 7, 1995.
- "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," P.A.C. Pharmaceutical Meeting: New Thinking, New Customers. February 28, 1995.
- "Beyond Brand Management," Wharton MBA Marketing Club, January 23, 1995.
- "The Value of Marketing Program," Janssen Pharmaceutica, January 9, 1995.

- "Research Priorities in Marketing as Derived From the SEI Center for Advanced Studies in Management Work on Creating Successful 21st Century Enterprises," Doctoral Proseminar, November 16, 1994.
- "Entering the U.S. Consumer Durable Markets," Nijenrode Executive MBA Program, August 4, 1994.
- "The Challenge of a New Marketing Paradigm," University of Texas at Austin, March 23, 1994.
- "Creating a Successful 21st Century Enterprise: Implications for Business and Marketing Theory,

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Practice, Research and Education," The University of Tokyo, November 4, 1994.

- "The Marketing Challenges for the Philadelphia Orchestra," Presentation to the Board of Trustees of the Philadelphia Orchestra, March 1, 1994.
- "Re Engineering Pharmaceutical Marketing," 1994.
- "Is Your Marketing Obsolete? Implications of the New Marketing Paradigm for Business and Non-profit Organizations," YPO Philadelphia Chapter University, The Cloister, September 1994.
- "The Value of Marketing: A Research Agenda," Value of Marketing Conference, Stanford University, August 9, 1994.
- "Determining the Value of Marketing: A New Challenge to the Discipline," San Francisco AMA Conference, August 8, 1994.
- "Electronic Commerce: Progress and Prospects," AMA Conference, San Francisco, August 8, 1994.
- "Advances in U.S. Marketing and Their Implications to China," Joint faculty seminar of the School of Economics and Management, Tsinghua University and the School of Management, Peking University, June 15, 1994.
- "Toward a New Marketing Paradigm," a faculty seminar at the Hong Kong University of Science and Technology, School of Business and Management, June 14, 1994.
- "Empirical Generalizations in Marketing: Opportunities for MSI Research Program," MSI Board of Trustees Meeting, April 29, 1994.
- "Empirical Generalizations in Marketing: Some Observations," Wharton Conference on Empirical Generalizations in Marketing, February 16-18, 1994.
- "Increasing Marketing Effectiveness," Executive Conference of Schering-Plough International, January 18, 1994.

- "The Value of Pharmaceutical Advertising and Promotion," Coalition of Healthcare Communication Conference, Marketing Conference in an Era of Change, New York October 27, 1993.
- "Advances in Marketing Strategies," Nijenrode University Executive Program, August 6, 1993.
- "Global Consumer Brand Strategies: Problems and Prospects," Seminar for the Business Partners of the Norwegian School of Management, June 11, 1993.
- "Marketing Opportunities in Japan and East Asia," with Hotaka Katahira and the International Forum Participants, April 18, 1993.
- "Toward a New Marketing Paradigm: Implications for Marketing Departments," Advisory Board Meeting of the Wharton Marketing Department, April 8, 1993.

- Third Workshop on Marketing and Competitive Advantages with Ambrosetti Group, Milan on "The Customer Driven Company: From Concept to Reality," November 27-28, 1992.
- "The Global Marketing Challenge," Unilever Marketing Day, November 23, 1992.
- "The Strategic Impact of Market Driven Quality," with Paul R. Kleindorfer. ORSA/TIMS, San Francisco, Session on Customer Satisfaction and its Role in Global Competition. November 1992.

- "Marketing Skills and Strategies for the 1990's," Pfizer International Marketing Managers, Lambertville, NJ, December 1989.
- "Competitive Advantage Through Strategic Marketing," Contel Corporation, Lake of the Ozarks, MO, October 1989.
- "The Contributions of Strategy and Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Marketing Educators Conference, Chicago, August 1989.
- "Strategic Marketing," Studio Ambrosetti AP Milan Group, May 17, 1989.
- "The Marketing Challenge for Top Management:, Promises and Pitfalls of Expert Systems," University of California, Irvine, April 27, 1989.
- "A Contrarian Approach to Effective Pricing," The Pricing Institute, New York, March 7, 1989.
- "Achieving Competitive Advantage in Marketing," Securities Industry Association, Philadelphia, PA, March 6, 1989.

- "Courtyard by Marriott: Designing a Hotel Facility with Consumer Based Marketing Models," presented to the TIMS/AMA seminar Marketing Science: A Developmental Tool for Management Scientists, New York, November 16, 1988.
- "Technology and Marketing-Driven Global Portfolio of R&D Projects," with Robert DeLucia presented at the ORSA/TIMS Joint National Meeting in Denver, Co, October 26, 1988.

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- "Pitfalls and Challenges of Global Marketing," Second International Conference on Marketing and Development, Karl Marx University, Budapest, Hungary, July 12, 1988.
- "Information Technology and Marketing Strategy," with Eric Clemons, presented at IS, TC and Strategy Plenary Meeting, January 1988.

- "A New Challenge for Human Resource Management: Incorporating a Marketing Perspective," The Lauder Institute: International Human Resource Conference, December 1987.
- "Advances in Marketing Strategy and Research," Wharton Alumni Club, Milan, October 1987.
- "Marketing and Corporate Strategy," Studio Ambrosetti, Milan, October 1987.
- "Marketing for Financial Institutions," Studio Ambrosetti, Milan, October 1987.
- "Proactive Marketing Research and Modeling: Pitfalls and Prospects," PMRG Fall 1987 meeting, Captiva Island, Florida, October 1987.
- "Turning Salespeople and Non-Marketing Executives into Marketing Strategists," AMA Marketing Educators' Conference, Toronto, August 1987.
- "International Marketing," Wharton Alumni Club, Toronto, August 1987.
- "Marketing and Technology: Progress, Problems, and Prospects," European-American Symposium, Enschede, The Netherlands, June 29-July 1, 1987.
- "Market Segmentation: Shortcomings and Opportunities," 1987 Attitude Research Conference, West Palm Beach, Florida, May 1987.

- "Advances in Management Strategy: A Marketing Perspective," The Institute of Management Consultants, March 1986.
- "Advances in Global Marketing Strategy: Concepts, Methods, and Applications," International Symposium on Recent Developments in Management Research, Helsinki, Finland, 1986.
- "The Marketplace of the Future: Global Consumers," Advertising Research Foundation 50th Anniversary Conference, March 1986.
- "A Marketing Perspective for Public Management: Research Implications," Wharton Department of Public Policy and Management Brown Bag Seminar, January 1986.

- "Marketing to the U.S." A special meeting of the Chinese Management Association and the Taiwan Ministry of Trade, Taipei, July 1985.
- "Advances in Portfolio Analysis and Strategy," Chinese Management Association, Taipei, July 1985.
- "New Development in Marketing and Planning," WEFA/Lauder Seminar, Sessions on Advances in Market Segmentation, Product Positioning and Portfolio Analysis and Strategy, Tokyo, June 1985.
- "Advances in Portfolio Analysis and Strategy," University of Illinois, Theories of Marketing Practice Conference, May 1985.
- "Micro Computers in Marketing," Marketing Science Conference, March 1985.
- "Global Marketing Strategies," New York University, 1985.

- "Diffusion Models: The State of the Art," ASA conference, 1984.
- "Generating and Evaluating Industrial Marketing Strategies Using the AHP," TIMS Conference, November 1984.
- MRCA Conference on "The Affluent Market: New Data and Methodologies in Financial Services Planning," November 1984.

- "Increasing Marketing Productivity," S.F. Chapter of the AMA, March 1982.

- "Advances in Segmentation," Philadelphia Chapter of the AMA, Conference on Market Segmentation, January 1981.

- "Marketing Strategy," Delaware Valley Hospital Strategic Planning Program, May 1980.
- National Agricultural Marketing Association, Philadelphia, March 1977 and February 1978.
- Marketing Planning Conference, The AMA Western Michigan Chapter, Grand Rapids, March 1976.

5) The Network Challenge

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- “New Business Models: Challenges and Opportunities,” Mack Institute, November 20, 2015.
- “Exploring the Customer as the Core Axis for Transformation,” Fast Forward: Executive Strategies for Digital Personnel & Organized Transformation, Penn Club of New York, November 2, 2015.
- “Business Model Multipliers and Innovative Business Models,” LinKS @ Wharton G3, September 17, 2015.
- “The Digital Imperative,” Global CEO Program, March 9, 2015.

- “Surviving & Thriving in a Hyper-Connected World: An Ideal Design,” WEF Risk in a Hyper-connected World Project, November 13, 2011.
- “From Firm Centric to Network Orchestration,” MARS, November 8, 2011.

- “The Network Challenge,” SEI Connections Conference, June 8, 2010.
- “Organizational Networks for Effective Competition,” Tyco, February 4, 2010.

- “The Network Challenge,” SEI PB&T Management Team, November 9, 2009.
- “The Network Challenge,” SEI Center Annual Board Meeting, October 9, 2009.
- “Wharton Combined Boards Meeting Spring 2009 Opening Plenary Session,” Wharton Combined Boards Meeting, April 2, 2009.
- “Competing in a World of Network Orchestration: Implications for Marketing,” MPlanet, January 27, 2009.

- “Network Orchestration and Open Innovation Models,” SEI Center Board Meeting, November 7, 2008.
- “Making Your Way in the New Flat World Economy,” CASRO International Research Conference, May 6, 2008.
- “Competing in a Flat World,” Wharton Club of NY, February 5, 2008.

- “Network-Based Strategies and Competencies,” SEI Center Board Meeting, November 16, 2007.
- “Network Orchestration: Core Competencies for a Borderless World,” Wharton-INSEAD Impact Conference: Network-Based Strategies and Competencies, November 9, 2007
- “Network Orchestration,” Network-Based Strategies & Competencies Workshop, May 3, 2007.
- “Succeeding in a Flat World,” The Wharton Economic Summit, Philadelphia, April 12, 2007.
- “Web 2.0 & Social Networking: Implications for Management,” The Worldwide J&J Diabetes Franchise Leadership Team, January 3, 2007.

- “The Changing Nature of Corporations: Competing in a Flat World,” organizer and chair of a panel at the Milken Institute Global Conference, April 2006.

- “An Extended Example of New Risks and their Management in Supply Chains,” SEI Meeting, September 26, 2005.

- “Assessing Vulnerabilities,” System Approaches to Terrorism Conference at George Washington University, July 15, 2002.

- “State of the World: Trades, Problems and Prospects,” YPO Philadelphia Chapter University, The Cloister, September 1994.

- “Selecting and Negotiating International Strategic Alliances: Applications of the AHP,” TIMS Osaka, July 1989.

6) Future of Advertising

- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” The Wharton Future of Advertising Program, June 13, 2019.

- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” The Wharton

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Future of Advertising Program, December 10, 2018.

- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” The Wharton Future of Advertising Program, June 25, 2018.
- “Guidelines for Turning Ad Avoiders Around,” AdAvoidance X Science, April 19, 2018.

- “Marketing 2020, Towards Idealized Design,” US Market Senior Leader Meeting, November 30, 2017.
- “The Future of Advertising,” Aresty Institute – Digital Marketing Strategies for the Digital Economy, November 28, 2017.
- “The Road Ahead: Lessons from the Wharton Future of Advertising Program,” CTAM Insights and Analytics Council, November 14, 2017.
- “Advertising 2020: Insights from the Wharton Future of Advertising Program,” The Council for Research Excellence Future Webinar, October 26, 2017.
- “The Future of Advertising: Lessons for City Magazine Publishers,” City Magazine Publisher Conference, October 13, 2017.
- “The Future of Advertising,” Merck Marketing Program, September 28, 2017.
- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” Digital Marketing Academy Merck, July 17, 2017.

- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” Wharton Future of Advertising Program, December 8, 2016.
- “The Future of Media in the Context of the Future of Advertising,” The Media Future Summit, October 27, 2016.
- “The Role of the CMO in All-Touchpoint Value Creation,” 2016 ANA Masters of Marketing Conference, October 19, 2016.
- “Don’t Call it a Phone: Marketers’ New Mobile Perspectives “Beyond Advertising,” Advertising Week NYC 2016, September 28, 2016.
- “Reimagine Market Research: Insights from the Wharton Future of Advertising Program,” ESOMAR Congress 2016, September 19, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Pfizer, September 13, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Integrated Marketing Virtual (IMV), June 23, 2016. <<http://imv.targetmarketingmag.com/register/?source=Wharton>>
- “New Creativity Standards for the Future,” Cannes Lions, June 18, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Marketing Science Institute, May 18, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Turner Ad Lab, April 28, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Edelman Lunch and Learn, April 26, 2016.

- “Network Orchestration Leadership for CMOs,” ANA, NYC, December 11, 2015.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Nationwide Meeting at SEI, November 10, 2015.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” WFOA Future Vision Series, November 9, 2015.
- “The Role of the CMO As a Network Orchestrator,” ANA Master Circle Roundtable, Orlando, October 14, 2015.
- “Advertising in the Age of Watson,” Cannes Lions, June 25, 2015.
- “Designing the Future of Advertising Now,” Italia Innovation Program - Venice Innovation Cluster, June 30, 2015.
- “Beyond Advertising: Creating Value Through All Touchpoints” 2014 WFOA Future Vision Series (CAA), Los Angeles, June 5, 2015.
- “Addressing the Capabilities and Talent Challenges,” ANA Workshop - Capability & Talent Leadership Program, Philadelphia, May 12, 2015.
- “Digital Opportunities in Luxury Retail,” Online Luxury Retailing Conference, New York, April 30, 2015.

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- “Beyond Advertising: Creating Value Through All Touchpoints,” 2015 WFoA Future Vision Series, MDC Innovation Centre, NYC, April 10, 2015.

- “Text Mining vs. Surveys,” The Advertising Research Foundation, March 26, 2014.
- “Saving the Golden Goose: A Framework for Maximizing Effectiveness and Transparency in Native Advertising,” Festival of Media – Asia Pacific, Singapore, March 17, 2014.
- “Get Ready for Advertising 2020... Now: Lessons from the Wharton Future of Advertising Program’s Advertising 2020 Project,” AMA Philadelphia, Chapter Meeting, March 7, 2014.
- “The Future of Advertising – Now!” CMO Workshop at Wharton, March 6, 2014.
- “Get Ready for Advertising 2020...Now: Lessons from the Wharton Future of Advertising Program’s Advertising 2020 Project,” FFWD Advertising & Marketing Week, Toronto, January 29, 2014.

- “Advertising and Media 2020: Implications for Action,” Cannes Lions Young Media Academy, June 19, 2013.
- “The New Frontiers of Retailing,” Fung Group Idealized Workshop, May 29, 2013.
- “Creating an Agile and Innovative Organization: Lessons from the FoA Program,” Strategic Agility & Innovation Workshop, IDC Herzliya, June 17, 2013.
- “Innovative Approaches to Measuring Advertising Effectiveness,” Wharton Future of Advertising Program and Wharton Customer Analytics Initiative, May 16, 2013.
- “Insights from Advertising 2020,” ARF Webinar, May 9, 2013.
- “Insights from Advertising 2020,” ARF Rethink: Unparalleled Knowledge, Unparalleled Networking, March 17, 2013.
- “Facebook Roundtable,” Wharton Future of Advertising Program, January 18, 2013.
- “The Implications of Advertising 2020,” ARF Rethink 2013. March 19 2013,” Wharton Future of Advertising, January 18, 2013.

- “The Future of Advertising Program; Global Insight Roundtables: China,” Beijing, July 25, 2012.
- “What’s Next for Empirical Generalizations in Advertising,” Emirical Generalizations in Advertising II: Whar works in the New Age of Advertising and Marketing, June 1, 2012.
- “The Secrets of Viral Ads,” Wharton-MARS Project Update, March 2012.
- “The Secrets of Viral Ads,” Post-Advertising Summit Story Worldwide, March 29, 2012.

- “Rethinking Marketing and Advertising Research,” Future of Advertising Global Advisory Board Meeting, December 9, 2011.
- “Toward a New Mental Model of Advertising: Implications to Orchestration, Business & Revenue Models,” FoA Orchestration Session, October 27, 2011.
- “The Future of Brand Building and Brand Experience: Blurring Boundaries Between Advertising and Retailing,” Workshop Session with the Jay H. Baker Retailing Initiative, April 21, 2011.
- “The Future of Sports Advertising,” WSBI Alumni Advisory Committee Mtg, April 7, 2011.
- “The Future of Marketing & Advertising: An opportunity for Preeminence,” Wharton External Affairs Director’s Meeting, March 21, 2011.
- The Future of Sports Advertising, Innovations and Experiments with Multi Touch Point Portfolios,” Leverage Sports Agency, March 16, 2011.
- “The Future of Advertising, The Wharton Club of London, February 18, 2011.

- “The Future of Advertising is Now,” IESE, May 17, 2010.
- “Future of Advertising,” Future of Advertising Project Global Advisory Board Working Session, March 10, 2010.

- “Future of Advertising: Progress and Prospects,” Board Meeting of Ehrenberg-Bass Institute, November 10, 2009.
- “The Future of Advertising Project and The New Marketing Challenges,” SEI Center Annual Board Meeting, October 9, 2009.
- “The Future of Advertising Project (Project Update),” Future of Advertising Project Global Advisory Board Meeting, October 8, 2009.
- “What We Know about Advertising: Implications for Management and Measurement,” Audience Measurement 4.0, June 24, 2009.

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- “Empirical Generalizations in Advertising: What We Know, Don’t Know, Can’t Know, and Should Know,” Rethink The ARF Annual Convention, March 31, 2009.
-
- “Taking Stock of Existing Advertising Empirical Generalizations,” Wharton Impact Empirical Generalizations in Advertising Conference, December 4, 2008.
- “The Future of Advertising if NOW: Project Overview and Update,” SEI Center Board Meeting, November 6, 2008.
-
- “The Future of Advertising,” SEI Center Board Meeting, November 16, 2007.

7) Future of Management Education

- “A Future Without the Disciplinary Silos,” Enago’s See the Future 2021, October 28, 2021.
-
- “Preparing for a Paradigm Shift: Inspiring Innovation in your Classroom,” Reimagine Education Conference, December 8, 2020.
- “Reimagine Education for the Post-Pandemic Era,” IDC, December 7, 2020.
- “Reimagine Education for the Post-Pandemic Era,” Curtis Institute of Music: Performance Innovation Lab, November 30, 2020.
- “Reimagine Education for the Post-Pandemic Era,” OEB Global 2020, November 19, 2020.
- Panel: “Working out what works – practical innovations for online learning,” with Nunzio Quacquarelli, iFest Conference of Leaders 2020, August 18, 2020.
- “Higher Education Will Change Forever: Here’s How!,” EDTECH Week North America, June 4, 2020.
-
- “Good Practice in Distributed and Online Learning,” iFest Panel, August 27, 2019.
- “Who Should Care? A Strategic Look at Modernizing Learning,” iFest Panel, August 26, 2019.
- “Role of Technology in Higher Education,” Pennsylvania Academy of the Fine Arts (PAFA) Technology Committee and School Committee, March 21, 2019.
-
- “Reimagine Education,” QS Reimagine Education Conference, November 29, 2018.
-
- “Lessons from the Reimagine Education Global Competition 2014-2017,” IDC Strategic Planning Meeting, December 17-18, 2017.
- “MBA for Executive at 40: Reflections and Musings about the Future,” Executive MBA Program, November 11, 2017.
-
- “Wharton Fellows’ Singapore Master Class: The Next Big Thing,” Wharton Fellows, October 2-5, 2016.
-
- “Israel Knowledge@Wharton: Implications,” Israel Knowledge@Wharton Launch Event and Working Forum, October 12, 2012.
-
- “Managing Change in Higher Education: Challenges, Approaches & Action Plans,” NACUBO Conference on Managing Change, September 30, 2011.
-
- “Management Education 2020”, Wharton Combined Boards Meeting, October 15, 2010.
-
- “Reinventing Management Education,” SEI Center Annual Board Meeting, October 9, 2009.
- “Socially Responsible Capitalism Approaches to Improving Business and Government Relations,” SEI Center Annual Board Meeting, October 9, 2009.
- “Future of Management and Management Education,” SEI Center Annual Board Meeting, October 8, 2009.
- “The Financial Crisis and the Changing Relationship between Business and Government,” Chiefs of Staff Meeting, September 15, 2009.
-
- “Approaches for Redesigning the Total Wharton Experience,” The Wharton School, May 15, 2009.

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- "Challenging the Current MBA," January 1, 2008.

- "Thought Leadership," The Wharton Economic Summit, April 12, 2007.
- "The Future of Management Education," International Academy of Management @ IMD, March 16 and 22, 2007.

- "Perspectives on Research: Innovation, Impact, and Fun," The Joseph Wharton Scholars Senior Research Seminar, October 11, 2006.
- "Reinventing the MBA," Panelist at the MBA Roundtable Session on MBA 2020: Curricular Innovation for Tomorrow's Business School," October 6, 2006.
- "New Frontiers in the Practice of Management" with Paul Kleindorfer, CEO Workshops at IDC Israel, February 2006.

- "Toward a New Theory of the Firm," SEI Center Board Meeting, October 7, 2005.
- "The Lauder Institute: 1984-2005: A Reexamination," The Lauder Institute, July 12, 2005.

- "e-Bus: The Curriculum and Research Challenge: A Discussion with Jerry Wind," Faculty Seminar, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- "Reinventing Training for the Global Information Age," Delphi e-Learing Conference, January 2001.

- "Creating a University for the Global Information Age," The Inaugural Lecture of the Wharton-Singapore Management University, July 2000.
- "Reinventing the Business School for the Global Information Age," plenary session, The EFMD Deans and Directors Meeting 2000, Helsinki, Finland, January 2000.

- "The Information Revolution and the Emerging Management Education Paradigm," On Line Educa, Berlin, December 1998.
- "Towards a New Management Education Paradigm," IDC Faculty Workshop, June 1998.

- "Choices and Strategies for Universities in the Global Information Age," Provosts Seminar on Information, February 1997.

- "Creating a 21st Century Enterprise," Universidad Adolfo Ibanez, Vina del Mar, Chile, October 1996.
- "Creating a 21st Century Enterprise: Implications for Boards of Directors," Enhance Board of Directors, September 1996.
- "The Stakeholder Challenge for Increased European Competitiveness," Wharton European Forum, (London, England), March 29, 1996.
- "The Next Enterprise: Creating a Successful 21st Century Enterprise Today," The Hong Kong Management Association, January 12, 1996.

- "Toward Virtual Management Education," International Academy of Management (Boston, MA), December 8, 1995.
- "The Virtual University: Research and Action Agenda," The Virtual University Conference, SEI Center, January 12, 1995.

- "A New Management Paradigm for the 21st Century Enterprise," Conference of the International Academy of Management, December 9, 1994.
- "Textbook of the Future: A Perspective From the Virtual University Lab," April 8, 1994.
- Neuhauf Lecture, "The Impact of Marketing Science on Industry and Academia: Applications, Results and Lessons," at Rice University, March 23, 1994.
- "Role of Marketing in the New MBA Curriculum: Lessons from the Wharton Experience," AMA Winter Conference, February 21, 1994.

- "The New Wharton MBA Curriculum," Faculty seminar at Erasmus University, March 10 and June 10, 1993.

- "Designing & Implementing an Innovative MBA Program: Lessons from the Wharton Experience,"

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Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.

- "The Globalization of Management Education: Options, Trade-Offs, and an Agenda for Implementation," AACSB Annual Meeting, Montreal, April 18, 1989.
- "Management Education in a Global Context," University of Pennsylvania Conference on Management Education and Foreign Languages, December 1984.

8) Marketing Research & Modeling

- "Reimagine Market Research: Insights from the Wharton Future of Advertising Program," ESOMAR Congress 2016, New Orleans, September 19, 2016.
- "The Changing Role of Marketing Research," 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 29, 2012.
- "Marketing Research in Times of Crisis," Navigating a New World Conference hosted by Greater NY and Phila Marketing Research Association, April 16, 2009.
- "Online Panels: Where We Are Today and in the Future," CASRO, June 22, 2007.
- "Adaptive Experimentation" The Sammy Ofer School of Communications and Information," IDC Herzliya, September 9, 2005.
- "Research Challenges in the Management of Extreme Events: The Case of the Office Homeland Security," with Paul Kleindorfer, Advisory Board Meeting of the Wharton Managing and Financing Extreme Event Project, December 2001.
- "Marketing Science: Accomplishments and Challenges in the Global Information Age," Informs, November 1999.
- "Marketing Research in the Global Information Age: Practice, Problems, and Prospects," Wharton-IDC Marketing Communications Program, March 1999.
- "Creative Joint Ventures and the Potential Role of the University," Philadelphia-Israeli Chamber of Commerce, June 1997.
- "The Use of Conjoint Analysis-Based Survey to Determine Consumer Price Elasticities," Debriefing Session for the Anti-Trust Division, Washington, D.C., February 1997.
- "Address on Issues in Marketing Research for Legal Cases: Necessity of Using Controls and the Propriety and Risk of Repetitive Probes," Marketing and Public Policy Conference, Washington, D.C., May 1996.
- "Marketing Science at a Crossroad," Inaugural Presentation as the first holder of the Unilever-Erasmus Marketing Professorship, Erasmus University, February 18, 1993.
- "Time Based Competition: Implications for Marketing Science," INSEAD Faculty Presentation, January 1992.
- "Marketing Research and Modeling for the 21st Century Enterprise: The Emerging Crisis and its Challenges," Management Science Roundtable, Redington Beach, FL, February 17, 1991.
- "Concept Testing for Generating and Evaluating Positioning Strategies," PDMA Positioning Conference, New York, NY, March 6, 1990.
- "Second Generation Expert Systems: Incorporating Enhanced Explanation and Learning," Marketing Science Conference, Jouy-en-Josas, France, June 24-26, 1987.

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- "Advances in Marketing Research and Modeling," Studio Ambrosetti, Milan, December 1986.
- "Expert Systems in Marketing," TIMS October 1986 Conference, Miami.
- "The Contribution of Consulting to the Consumer Research Discipline," ACR conference, October 1984.

9) Israel

- "Innovative Pedagogical Approaches in Higher Education" IDC, March 25, 2015.
- "Getting the Most from Your Israel Visit," 2012 Faculty International Seminar to Israel/Turkey, April 25, 2012.
- "Israel: Insights and Opportunities: Background Discussion for GIP Israel Program," GIP Israel Program, November 16, 2010.
- "Making the Case for Israel," IDC Panel Discussion, Israel, May 26, 2010.
- "The Challenge of Marketing Israel," Israeli MBA Conference, April 19, 2009.
- "A New Management Paradigm for Israel's Schools of Management: Lessons from the New Wharton MBA Curriculum," Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.

10) Video Presentations: Illustrative Topics

- Video Interview re *Transformation in Times of Crisis* with Nitin Rakesh, India Inc, March 9, 2021.
- "The Future of Marketing: M.A.D.E.S. and R.A.V.E.S." Target Marketing, 2016.
- "Transforming Corporate Cultures by Celebrating Failures," Knowledge@Wharton in collaboration with Mphasis, Oct 13, 2015.
- "The CMO Advantage: Evolving beyond the Digital Revolution," Wharton Executive Education, April 14, 2015. <<https://www.youtube.com/watch?v=a1-qxoMCXIs>>.
- "Should You & Can You Inspire Curiosity?" TEDxFreeLibraryofPhiladelphia, January 25, 2015.
- "Wharton Future of Advertising Research," Tsou, Rose & Wind, Jerry, The Festival of Media Asia 2014, March 16, 2014. <<https://www.youtube.com/watch?v=79hIMyUB5fg>>.
- "Should You & Can You Inspire Curiosity?" TED x Free Library of Philadelphia. September 17, 2014. <<https://www.youtube.com/watch?v=Kx2ZF3-10B8>>.
- "Can Technology Help Enhance Student Engagement?" Engaging Students Through Technology Symposium, November 1, 2013. <<https://www.youtube.com/watch?v=FDRVrXUCeds>>.
- "The Four Minute Mile & Its Implications for B2B Marketers," Google Small Business, October 18, 2011. <<https://www.youtube.com/watch?v=fXjnXz9-qPs>>.

I. Illustrative Podcasts

- "WORK. With Wharton School Professor Jerry Wind," Open Assembly, February 2, 2021. <<https://open-assembly.com/blog/work-with-wharton-school-professor-jerry-wind>>.
- *Transformation in Times of Crisis* podcast recording, Open Assembly, January 20, 2021.
- "The Wharton School's Jerry Wind on Sotheby's Going Private," ArtTactic, July 23, 2019. <<https://soundcloud.com/arttactic/whartons-jerry-wind-on-sothebys-going-private>>.

- "Welcome to the Reimagine Education Conference 2017 with Jerry Wind and Barbara Kurshan," Wharton Business Daily, December 12, 2017.
<https://podcasts.google.com/feed/aHR0cHM6Ly9mZWVkcj5hY2FzdC5jb20vcHibGljL3Nob3dzLzVhYjU0YzcwYml2ZGRmNDU1MjdIMDZiMQ/episode/dGFnOnNvdW5kY2xvdWQsMjAxMDp0cmFja3MvMzY4OTgzMjU5?sa=X&ved=2ahUKEwiZ-9adw_jsAhWEgFkKHQI2CYsQkfYCegQIARAF>.

6. PROFESSIONAL AFFILIATIONS AND AWARDS

I. Professional Affiliations

1. Fellow of the International Academy of Management (since 1989), Chancellor 2000-2006, Vice Chancellor for the Americas, 1996-2000
2. Academy of International Business
3. American Marketing Association
4. American Association for Public Opinion Research
5. American Psychological Association, Division of Consumer Psychology (Div. 23)
6. Association for Consumer Research
7. International Communication Association
8. Product Development and Management Association
9. Psychometric Society
10. Strategic Management Society
11. INFORMS – The Institute of Management Sciences
12. The Market Research Society (London)

II. Professional Awards

1. Honorary Degrees

M.A. Honors, University of Pennsylvania, 1971

2. Awards

- Inducted into the Marketing Hall of Fame, 2017
- Member of the Inaugural Cohort of the **AMA Fellows**, 2015.
- One of the original 10 **Legends of Marketing**, 2009. An 8-volume set of anthologized work published by Sage, 2013.
- **Buck Weaver Award**, Massachusetts Institute of Technology, 2007.
- **Honorary Fellow of the Decade**, Interdisciplinary Center, Herzliya (Israel), May 2004.
- The **2003 Elsevier Science Distinguished Scholar Award** of the Society for Marketing Advances
- One of the **10 Grand Auteurs** in Marketing. [Alain Jolbert, EMS Management and Societe, 2000]
- One of 18 JAR articles in the Special Classics Issue of **articles that have withstood the test of time**. Nov./Dec. 2000.
- **The Paul D. Converse Award**, 1996.
- **American Marketing Association/Irwin Distinguished Educator Award**, 1993.
- **First Faculty Impact Award**, Wharton Alumni Association, 1993.
- First Runner-Up in the **1988 Franz Edelman Award for Management Science/Achievement**.
- **The 1985 Charles Coolidge Parlin Award**.
- Elected as the 1984 member of the **Attitude Research Hall of Fame**.
- Delivered the 13th (1981) **Albert Wesley Frey Lecture**, University of Pittsburgh.
- My *Product Policy* book won the **1979 Book of the Year Award** given by the editors of Expansion (Mexico).
- Winner of two **Alpha Kappa Psi Foundation Awards** for the best article published in the *Journal of Marketing* in 1973 and 1976.
- Runner up of the 1983 **William O'Dell Award** for "the article published 5 years earlier in JMR which stood the test of time and made the most significant long run contribution to Marketing Theory, methodology and practice".
- **Winning paper** (with Paul E. Green) of American Psychological Association Division of Consumer Psychology, 1972 Research Design Competition.
- A finalist (top 5) for the 1980 Wharton Award for teaching excellence.

3. Illustrative Citations

- Third highest ranked Marketing Scholar in the University of Maryland's Kirkpatrick and Locke Faculty

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Scholarship Study, 1985 (based on number of publications, citations, and peer ratings).

- 10th highest ranked marketing Scholar in the Cote, Leong and Cote "Assessing the Dissemination and Utilization of Marketing Research in the Social Sciences: A Citation Analysis Approach," 1990.

4. Illustrative Research Grants

- National Science Foundation: U.P. Research Grant (Summer 1970);
- General Foods, the Jell-O Division (1971);
- N.W. Ayer (1972) - (with Paul E. Green);
- Downe Communication, Inc. (1972);
- Lever Brothers (1972) - (with Paul E. Green);
- Thomas Jefferson University Hospital (1973);
- AT&T (1973);
- The Robert Wood Johnson Foundation Clinical Scholar Fund (1974);
- The John and Mary R. Markle Foundation with R.E. Frank (1975-1976);
- National Science Foundation (Grant No. 51575-12928) (1975);
- The National Health Care Management Center of the Leonard Davis Institute with Thomas Robertson (1977).
- Wharton Global Initiatives Research Program (2010)
- Wharton Sports Business Initiative Program (2010)
- Global Initiatives Research Program (2014)

5. Fellowships

- Hebrew University Awards 1959/1960; 1964/1965; 1965/1966;
- Ford Foundation Fellowship 1963/1964;
- Owen D. Young: General Electric Fellowship in Marketing 1964/1965; 1965/1966;
- Bankendorf Fellowship 1964/1965;
- Stanford University Fellowship 1964/1965; 1965/1966.

6. Illustrative Recent Media Coverage

- Knowledge@Wharton:
 - Amazon vs. Walmart: Which One Will Prevail? [June 27, 2017]
<http://knowledge.wharton.upenn.edu/article/amazon-vs-walmart-one-will-prevail/>
 - How Insurers Can Protect Against Digital Disruption [March 03, 2017]
<http://knowledge.wharton.upenn.edu/article/insurers-can-protect-digital-disruption-2/>
 - How Platforms Will Disrupt the Future of Media and Entertainment [November 18, 2016]
<http://knowledge.wharton.upenn.edu/article/platforms-will-disrupt-future-media-entertainment/>
 - Assets vs. Access: A Digital Reality for Commercial Real Estate [September 14, 2016]
<http://knowledge.wharton.upenn.edu/article/assets-vs-access-digital-reality-commercial-real-estate/>
 - How Industrial Firms Can Pivot to Digital Business Models [July 25, 2016]
<http://knowledge.wharton.upenn.edu/article/industrial-firms-can-pivot-digital-business-models/>
 - How to Get Your Enterprise Digitally Ready and Agile [April 27, 2016]
<http://knowledge.wharton.upenn.edu/article/how-to-get-your-enterprise-digitally-ready-and-agile/>
 - Ahead of the Class: Mapping Education's Next Transformation [March 18, 2016]
<http://knowledge.wharton.upenn.edu/article/ahead-of-the-class-mapping-educations-next-transformation/>
 - Click Here: How Advertisers Can Beat Ad Blockers [December 10, 2015]
<http://knowledge.wharton.upenn.edu/article/click-here-how-advertisers-can-beat-ad-blockers/>
 - How Apple's Latest Offerings Will Expand Its Piece of the Pie [September 14, 2015]
<http://knowledge.wharton.upenn.edu/article/how-apples-latest-offerings-will-expand-its-piece-of-the-pie/>
 - Why Companies Need Their Customers to 'Love' Them [August 04, 2015]

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- <http://knowledge.wharton.upenn.edu/article/why-companies-need-their-customers-to-love-them/>
- Is Your Leadership Style Right for the Digital Age? [February 06, 2015]
<http://knowledge.wharton.upenn.edu/article/the-right-leadership-style-for-the-digital-age/>
- A Glimpse of the Future: The 'Oscars of Innovation in Higher Education' [January 16, 2015]
<http://knowledge.wharton.upenn.edu/article/glimpse-future-oscars-innovation-higher-education/>
- Can Creativity Be Taught? [August 27, 2014]
<http://knowledge.wharton.upenn.edu/article/can-creativity-be-taught/>
- Shhh! Marketing Embarrassing Products in the Age of Social Media [August 12, 2014]
<http://knowledge.wharton.upenn.edu/article/marketing-embarrassing-products/>
- Will Consumers Be Sold on an eBay-Sotheby's Collaboration? [July 23, 2014]
<http://knowledge.wharton.upenn.edu/article/will-consumers-sold-ebay-sothebys-collaboration/>
- How Innovation and the 'Reimagined' Classroom Will Change Learning [June 12, 2014]
<http://knowledge.wharton.upenn.edu/article/innovation-reimagined-classroom-will-change-learning/>
- Body Slams, Vicious Dogs, Tidal Waves: How Effective Are Violent Ads? [February 25, 2014]
<http://knowledge.wharton.upenn.edu/article/body-slams-vicious-dogs-tidal-waves-effective-todays-violent-ads/>
- The Tata Group and Tel Aviv University Invest in Innovation — and Each Other [August 1, 2013]
<http://knowledge.wharton.upenn.edu/article/tata-group-tel-aviv-university-invest-innovation/>
- Israel and China: The 'Odd Couple' Trading Partners Tighten Their Ties [June 25, 2013]
<http://knowledge.wharton.upenn.edu/article/israel-and-china-the-odd-couple-trading-partners-tighten-their-ties/>
- Can RIM Reinvent Itself? [February 04, 2013]
<http://knowledge.wharton.upenn.edu/article/can-rim-reinvent-itself/>
- A Farewell to Two Business Visionaries [October 10, 2012]
<http://knowledge.wharton.upenn.edu/article/a-farewell-to-two-business-visionaries/>
- From Fringe to Mainstream: Companies Integrate CSR Initiatives into Everyday Business [May 23, 2012]
<http://knowledge.wharton.upenn.edu/article/from-fringe-to-mainstream-companies-integrate-csr-initiatives-into-everyday-business/>
- The U.S. Demographic Shift: A 'Tipping Point' for Marketers [May 22, 2012]
<http://knowledgetoday.wharton.upenn.edu/2012/05/the-u-s-demographic-shift-a-tipping-point-for-marketers/>
- Putting the Squeeze on Consumer Choice [September, 23, 2011]
<http://knowledgetoday.wharton.upenn.edu/2011/09/putting-the-squeeze-on-consumer-choice/>
- Harnessing Networks to Create Value and Identify New Opportunities [July 15, 2009]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=2289&specialid=88#>
- What Does it Take to Compete in a Flat World? [October 31, 2007]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1836>
- Can't Run, Can't Hide: New Rules of Engagement for Crisis Management [September 19, 2007] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1807>
- Will a New Theory Help Firms to Manage in a 'Flat' World? [October 25, 2006]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1588>
- Business Books for the Beach, The Power of Impossible Thinking [March 22, 2006]
http://knowledge.wharton.upenn.edu/special_section.cfm?specialID=22
- Farewell, Peter Drucker: A Tribute to an Intellectual Giant [November 30, 2005]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1326>
- Should Your Next CEO Be a Philosopher? [interview, February 9, 2005]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1125>
- What's the Buzz About Buzz Marketing? [interview, January 12, 2005], reprinted in *Wharton Alumni Magazine*, Winter 2005
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1105>
- Amazon's Multiple Personalities [interview, January 14, 2005]
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- <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1088>
- Back to the Drawing Board: Is the Traditional Theory of the Firm Obsolete? [interview, October 6, 2004] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1047>
- The Power of Impossible Thinking [book, August 25, 2004]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1022>
- What's Behind the 4-Minute Mile, Starbucks, and Moonlanding? The Power of Impossible Thinking [book, July 14, 2004]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1007>
- A Lofty Take on Leadership: Mountain Climbing and Managing Companies [book, September 24, 2003] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=858>
- How Business Can Prepare for War [conference, February 9, 2003]
- Could a Cyber-Terrorist Take Down Your Company? Don't Wait to Find Out [conference, August 28, 2002] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=615>
- The New Business Reality [conference, January 30, 2002]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=509>
- What Webvan Could Have Learned from Tesco [interview, October 10, 2001]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=448>
- What's in Store for Capital Markets and the Economy? [interview, September 26, 2001]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=436>
- Did Terrorists Blow Up the Recovery? [interview, September 13, 2001]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=425>
- Dotcom Bomb Hits the Publications that Covered It [interview, August 29, 2001]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=418>
- Can Priceline Remain Profitable? [interview, August 15, 2001]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=412>
- Good vs. Great Leaders: The Difference is Humility, Doubt, and Drive [conference, June 20, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=377>
- It's Not Easy Being Paul Green [interview, November 8, 2000]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=262>
- Three Marketing Lessons from the Love Bug [interview, May 24, 2000]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=184>
- Just-in-Time Education: Learning in the Global Information Age [paper, August 30, 2000]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=236>
- New Rules of Digital Marketing [interview, October 13, 1999]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=79>
- Who's Buying on the Internet? [paper, September 1, 1999]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=63>
- Marketing Strategy in the Global Information Age [lecture, July 23, 1999]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=36>
- The Knowledge Edge [conference, June 23, 1999]
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=34>
- Knowledge @ Wharton, High School Edition [glossary of various marketing terms]
- "It's advertising, but not as we know it," ResearchWorld, 2016. <https://doi.org/10.1002/rwm3.20399>
- "10 Moves That Will Become Shakers for 2020 Advertising," The Economic Times, July 15, 2013. <https://economictimes.indiatimes.com/blogs/Globalpositioning/10-moves-that-will-become-shakers-for-2020-advertising/>
- "Is open innovation the future of advertising?" MediaJobs, May 13, 2013. <http://mediajobs.com/is-open-innovation-the-future-of-advertising/2988/>
- "Has Johnson & Johnson lost its way?" Leader, August 1, 2012.
<http://www.leader.co.za/article.aspx?s=1&f=1&a=3843>
- "Facing Up to Change: The Executive Challenge," iedp.com, July 13, 2012.
http://www.iedp.com/Blog/Wharton_Fellows_Keep-Up_Deal_with_Change
- "6 Steps to Achieving Creativity in Business, Personal Life," US News and World Report, January 3, 2011. <http://health.usnews.com/health-news/family-health/brain-and-behavior/articles/2011/01/03/6-steps-to-achieving-creativity-in-business-personal-life.html>
- "Wharton's Jerry Wind Predicts the Future of Advertising," IESE Insight, May 19, 2010.
<http://www.iese.edu/aplicaciones/news/view.asp?id=2333&lang=en>
- Interviewed in report on the *Future of Advertising Project*, VMarketing China Magazine, April 2010.

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- Listing of *The Network Challenge: Strategy, Profit, and Risk in an Interlinked World* in “KYW News Radio 1060 AM’s 10 Books to Read by Marc Kramer.” November 1, 2009.
- “World Series a marketing windfall for Philadelphia,” Philly.Com, October 27, 2009.
<http://www.philly.com/philly/business/66284122.html>
- Media coverage of Fast Forward (<http://www.youtube.com/user/FastForward>), the Marketing Channel on YouTube co-founded with Google:
 - “Truth in Advertising,” Penn Gazette, September, 2009.
<http://www.upenn.edu/gazette/0909/gaz07.html>
 - “YouTube’s FastForward Biz Site Off to Slow Start,” ReadWriteWeb Blog, September 23, 2009.
http://www.readwriteweb.com/archives/youtubes_fastforward_biz_site_off_to_slow_start.php
 - “Fast Forward. Connecting marketers with innovative ideas (and other marketers),” YouTube Biz Blog, September 23, 2009. <http://ytbizblog.blogspot.com/2009/09/fastforward-connecting-marketers-with.html>
 - “Will the Future of Advertising Be a Blend of Old and New Media?” Knowledge@Wharton, September 30, 2009. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2344>
 - “What’s the future of advertising?” InternetNews.com, October 2, 2009.
<http://blog.internetnews.com/dneedle/2009/10/whats-the-future-of-advertisin.html>
 - “New Year, New Look for Google for Advertisers,” Google Agency Ad Solutions Blog, January 13, 2010. <http://adwordsagency.blogspot.com/2010/01/new-year-new-look-for-google-for.html>
- “Interview: Yoram (Jerry) Wind,” First Friday Book Synopsis, July 26, 2009.
<http://ffbsccn.wordpress.com/2009/07/26/interview-yoram-jerry-wind/>. Also published on Examiner.com, July 26, 2009. <http://www.examiner.com/x-14678-Dallas-Business-Commentary-Examiner~y2009m7d26-Interview-Yoram-Jerry-Wind>
- “Tips for Better Networking Skills,” FOX Business News, July 17, 2009.
<http://www.foxbusiness.com/search-results/m/25340846/tips-for-better-networking-skills.htm>
- Featured book in Wharton Alumni Newsletter: *The Network Challenge: Strategy, Profit, and Risk in an Interlinked World*, July 2009. <http://www.wharton.upenn.edu/alumni/newsletter/2009/july/>
- “Future of Advertising? Print, TV, Online Ads,” Ad Age, June 1, 2009.
http://adage.com/article?article_id=136993
- “Wondering What to Do? We Asked the Experts,” Ad Age, April 6, 2009.
http://adage.com/article?article_id=135772
- “An Interview with Wharton Professor Jerry Wind at MPlanet 2009” on Marketing Shift Online Marketing Blog, January 28, 2009. <http://www.marketingshift.com/2009/1/an-interview-wharton-school-professor.cfm>
- Interview with LA Times on the financial crisis: Mindful Strategy, October 1, 2008.
- Interview with Sally Herships regarding Asia’s demand for large jewels, “A Glimmer in Hong Kong’s Eye.” Marketplace, NPR. February 20, 2008.
- “The Power of Impossible Thinking,” Podcast interview with LadyAdvisor.com, February 2008.
- Wharton@Work Report on the Las Vegas Fellows Master Class, January 2008.
- Interview on “Managing Creative People,” Joel Kurtzman (ed), *Creating Value Through People*. Wiley 2008.
- Research Conference Report Summary of CASRO Technology Conference Speech “Online Panels: Where We Are Today and Where We Are Headed in the Future,” August 2007.
- “The Power of Impossible Thinking,” Ocean City Public Library, BUSINESS BOOK CLUB, Book of the Week, October 07, 2007.
- Wharton media coverage of *Competing in a Flat World*:

Wharton Alumni Magazine	Winter	2008	Featured book
Wharton Alumni Magazine	December	2007	Featured article
Wharton Alumni Newsletter	August	2007	Featured book
Wharton Alumni Newsletter	December	2007	Featured book
Wharton Executive Education - - featured on home page	September	2007	Featured book
Wharton Faculty / Staff newsletter	September	2007	Featured book

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Wharton Faculty / Staff newsletter	December	2007	Competing in a Flat World Competition Announcement
Knowledge at Wharton	October	2007	Interview with audio download
Competing in a Flat World website	October	2007	Website went live in October

- Goh, Dr. Sunny T.H. "How to Make the Impossible Possible." *The Star Online*. July 10, 2006. thestar.com.my/news/story.asp?file=/2006/7/10/business/14512212&sec=business
- A link has been placed for the book *The Power of Impossible Thinking* on the website, www.worksavvy.ws/organization.htm#yourself as a recommendation to entrepreneurs and the diagram from page xxiv of the book is shown in the section of the website, "Organizing Yourself: Your Mind, Your Attitude, Time and Planning."
- "How Business Ideas are Born," MoneyControl.com, June 2, 2006.
- "Think You Know More Than Your Boss? You Just Might," Beepcentral.com, April 24, 2006.
- "New Model: Divide and Govern." *Directorship*. April 2006.
- "Creativity Comes to B-Schools," *Business Week Online*, March 26, 2006.
- Thomas Group Review. *The Power of Impossible Thinking*: A conversation with Yoram (Jerry) Wind and Jim Taylor. Also appeared at Knowledge Leadership @ Thomas Group, Winter 2006.
- *The Power of Impossible Thinking* selected as one of the five outstanding books on "Thinking Outside the Box" by the Swiss Journal *CASH* on March 16, 2006.
- "Marketing Prof. Gives Crash Course in Brand Image," *Daily Pennsylvanian*, February 9, 2006.
- "Churning Out Books for the Bigwigs," *Daily Pennsylvanian*, November 10, 2005.
- Inaugural Thought Leader interview, *The Brand Strategy Roundtable Journal*, November 2005.
- A number of radio interviews re *The Power of Impossible Thinking*, including:
 - *Something You Should Know* with Mike Carruthers, March 2006.
 - Mix 92.9 Morning Show, Nashville, March 2006.
 - KRMB Radio, Strategies for Living, Shreveport, LA, August 11, 2004.
 - WKCT Radio, Drive Time, Bowling Green, KY, August 20, 2004.
 - WABJ Radio, John Sebastian Morning Show, Detroit, MI, August 18, 2004.
 - WKNO Radio, Smart Copy, Memphis, TN, August 17, 2004.
 - KIKK Radio, Salt Lake City, UT, November 6, 2004.
- "Winds of Change," *The Economic Times, Brand Equity*, June 1, 2005, front page.
- "From Ink to Implementation: New Press Wharton School Publishing Co-Editors Say They Aim for Sound Management Titles that You Can Do Something With," *BusinessWeek Online*, April 11, 2005.
- "Power of Mental Models," *Asia Inc.* April 2005, pp. F14-15.
- "Challenge Your Mental Models," *The Edge Malaysia*, March 21, 2005.
- "Meet the Master-Minds: Jerry Wind Reveals the Power of Impossible Thinking," *Management Consulting News*, March 3, 2005.
- "Mental Power Tool," *Automotive Design and Production*, 2004.
- "Read All About It: Q&A with Jerry Wind about Wharton School Publishing," *Wharton Alumni Magazine*, Spring 2004.
- "Comment s'addresser au consommateur "Post-bull"? D'apres *Convergence Marketing Strategies for Reaching the Hybrid Consumer*, *Business Digest* 127 (February 2003), pp. 19-20.
- "Wealth is Created During Periods of Uncertainty," *Fast Company*, April 2002, pp. 87-88.
- "Thought Leaders: Convergence Marketing: Preview an excerpt from the book by Wharton Professor Jerry Wind and Professor Vijay Mahajan of the University of Texas," Wharton's E-Buzz, October 2001; and Knowledge@Wharton, October 2001.
- "Wind of Change," *The Peak*, Volume 17, Number 1, 2001.
- "Conversation with Jerry Wind," Singapore, October 2000; abstract reproduced in http://can.mediacorpnews.com/analysis_prog/incon/incon_wind1.htm.
- "You Can't Be An Extremist," *Globs* March 8, 2001 (Hebrew).
- Wind, Yoram (Jerry). "Managing in the Year 2000" *Executive Issues*. August 1991.

APPENDIX A 7. PERSONAL DATA

Office: The Wharton School
 University of Pennsylvania
 Philadelphia, PA 19104
 Tel: (215) 898-8267
 E-mail: windj@wharton.upenn.edu

Marital Status: Widowed; Two children.

Illustrative Pro Bono Activities

The Interdisciplinary Center, Herzliya (Israel), all planning activities and other involvement (as outlined on p. 75), since 1994.

American Friends of IDC, Founding President (1998-2002); Member (2003-present).

Government of Catalonia, International Advisory Board (2007-2017).

The Philadelphia Museum of Art, Trustee (1992-present); Founding chair of the Marketing Committee (2013-present); Member of PMA Brand Steering Group (2013-present); Member of the Digital Age Committee (2009-2013); Member of the Corporate Executive board of the Museum (1996-present); Led a committee of trustees, management, and curatorial staff in the development of a market driven strategy, (1990); Member of the Nominating Committee (1999-2002); Member of Trustee Committees for Development (1993-1997); Special Exhibitions (1993-1995); and Strategy (1997-1998); Chairman, Audience Building Committee (2004-2006).

The Curtis Institute, Trustee, Chair of the Communications Committee and Member of the Executive Committee (2019-present); Member of the Communication Committee (2016-2018).

Grounds for Sculpture, Member of the Board (2020-present).

Woodmere Art Musem, Chair of the Sculpture Experience Committee (2018-present).

Business for Diplomatic Actions, Member, Advisory Board and Coordinator of the Wharton research efforts in this area (2005-2010)

The Fox Chase Cancer Center, Member, Advisory Board (2009-2012)

Institute of Contemporary Art (ICA). Help guide a strategic planning process (2001).

The Jewish Federation of Greater Philadelphia: Member of the Financial Resource Development Committee, 1990-1992.

National Constitution Center, Member, Strategic Planning Steering Committee (2005)

Operation Independence, Israeli Management School Oversight Committee, 1991-1992.

The Philadelphia Orchestra: Advisor regarding the development of Marketing Strategy (1994-1997).

University of Pennsylvania Museum of Archeology and Anthropology. Help establish a vision and revenue generation strategies (1999).

Affiliations:

The Philadelphia Museum of Art – Trustee (Philadelphia)
 The Barnes Foundation (Philadelphia)
 The Institute of Contemporary Art of the University of Pennsylvania (Philadelphia)
 Pennsylvania Academy of the Fine Arts (Philadelphia)
 The Museum of Modern Art (New York)
 Museum of Art and Design (New York)

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The New Museum (New York)

Whitney Museum of American Art (New York)

The Jewish Museum (New York)

Guggenheim Museum (New York)

U.S. Holocaust Memorial Museum (Washington D.C.)

Title	Authors	Publication	Date	Publisher	Link
Ten Guidelines for Creating Opportunities in a Time of Crisis	Jerry Wind and Nitin Rakesh	Knowledge@Wharton	4/14/2020	K@W	https://knowledge.wharton.upenn.edu/article/ten-guidelines-create-opportunities-coronavirus-crisis/
Forever changed! Innovation and the future post-covid higher education landscape	Jerry Wind and Nunzio Quacquarelli	International Journal of Educational Advancement	3/9/2021	GRF Publishers	https://grfpublishers.com/article/view/MzYw/Forever-Changed-Innovation-and-the-Future-Post-Covid-Higher-Education-Landscape
Marketing's Role in Creating Opportunities in Times of Crisis	Jerry Wind	Big Bang Marketing 2020	5/26/2021	Kotler Impact	https://www.scribd.com/document/535576276/Big-Bang-Marketing-2020
Wharton Marketing: Where Academia Meets Practice (Presentation 74)	Eric T. Bradlow, Barbara E. Kahn, Cait Lamberton, Leonard M. Lodish, Robert J. Meyer, Raghu Iyengar and Jerry Wind	Customer Needs and Solutions	10/28/2021	Springer	https://www.amazon.com/BANG-MARKETING-2020-KOTLER-IMPACT-ebook/dp/B0962TRM75
Reimagine Executive Education (Chapter 16)	Jerry Wind	Executive Education After the Pandemic: A Vision for the Future	11/29/2021	Palgrave Macmillan	https://www.amazon.com/Executive-Education-after-the-Pandemic-A-Vision-for-the-Future/dp/3030823423
Genetic Data: Potential Uses and Misuses in Marketing	Remi Daviet, Gidi Nave and Jerry Wind	Journal of Marketing	2/1/2022	Sage	https://journals.sagepub.com/doi/full/10.1177/0022242920980767
Reflections by Yoram (Jerry) Wind	Jerry Wind	Foundations and Trends in Marketing	3/7/2022	Now Publishers	https://www.nowpublishers.com/article/Details/MKT-076

Title	Authors	Publication	Date	Publisher	Link
The Rebirth of Marketing and the Role of Chief Marketing Officers	Nick Primola and Jerry Wind	Management and Business Review	Spring 2022	MBR	https://mbrjournal.com/2023/02/14/the-rebirth-of-marketing-and-the-role-of-chief-marketing-officers/
Why don't we learn from history? (Op Ed)	Jerry Wind	QS Insights Magazine (Online)	April 2023	QS	https://magazine.qs.com/qz-insights-magazine-03/view#block-417fd89c-fe11-458c-9b7d-6449b5690b79
How to include ChatGPT within business school teaching (Op Ed)	Jerry Wind	TopMBA.com	6/8/2023	QS	https://www.topmba.com/mba-programs/how-include-chatgpt-within-business-school-teaching
Implications of the Consumer Journey to Traditional Consumer Surveys for Litigation (Chapter 2 in book)	Chad Hummel, Ben Mundel and Jerry Wind	<i>The Cambridge Handbook of Marketing and The Law</i>	July 2023	Cambridge Univ Press	https://www.cambridge.org/core/books/abs/cambridge-handbook-of-marketing-and-the-law/implications-of-the-consumer-journey-to-traditional-consumer-surveys-for-litigation/F4D6EDE70ED56506A71B221EA7FCA286
Creativity and Innovation in the Age of AI (Chapter 1 in book)	Jerry Wind, Margherita Pagani and Stacey Lynn Schulman	<i>Artificial Intelligence for Business Creativity</i>	7/5/2023	Routledge	https://www.taylorfrancis.com/chapters/edit/10.4324/9781003287582-3/creativity-innovation-age-ai-yoram-jerry-wind-margherita-pagani-stacey-lynn-schulman
Introduction to the Special Double Issue: AI for Customer Engagement	Jerry Wind, Margherita Pagani and Jerry Dischler	MBR	Winter and Spring 2023	Management Busniss Review	https://mbrjournal.com/AI-Customer-Engagement-issue/

Title	Authors	Publication	Date	Publisher	Link
3 Visions of the Future of AI for Customer Engagement: 2027 Scenarios	Jerry Wind, Mukul Pandya, Margherita Pagani and Jerry Dischler	MBR	Winter and Spring 2023	<i>Management Business Review</i>	https://mbrjournal.com/AI-Customer-Engagement-issue/
Special Double Issue: AI for Customer Engagement, Editor	Jerry Wind, Margherita Pagani and Jerry Dischler	MBR	Winter and Spring 2023	<i>Management Business Review</i>	https://mbrjournal.com/AI-Customer-Engagement-issue/
Beyond Surveys: A Holistic Marketing Approach to Assess the Validity of Legal Challenges	Chad Hummel, Ben Mundel and Jerry Wind		Working paper 2023		
Unlocking Creative Potential: The Role of Artificial Intelligence in Fostering Creativity within The Marketing Domain	Margherita Pagani and Jerry Wind		Working Paper 2023		
Foreign Direct Investment: A Value Proposition Framework	Prasant Salwan & Yoram Wind	The Indian Journal of Industrial Relations	January 2024		https://www.jstor.org/action/doBasicSearch?Query=Foreign+Direct+Investment%3A+A+Value+Proposition+Framework

APPENDIX A Trial and/or Deposition Testimony 2018-2024

2018

- Sandoz, Inc. v. Glaxo Group LTD, United States Patent and Trademark Office, Trademark Trial and Appeal Board, No. 91,229,470
[Pattishall McAuliffe]
Deposition
- Buckeye Tree Lodge and Sequoia Village Inn, LLC v. Expedia, Inc; Hotels.com, L.P.; Hotels.com GP, LLC; Orbitz, LLC; Trivago GmbH; Venere Net S.R.L DBA Venere Net, LLC; Expedia Australia Investments PTY LLD, United States District Court for the Northern District of California, No. 3:16-cv-04721-VC
[Covington Burling]
Deposition
- Nisha Brown, Kathy Williamson, individually and on behalf of all others similarly situated v. Wal-mart Stores, Inc., and Does 1 20 through 50 inclusive, United States District Court, Northern District of California, San Jose Division, No. 09-cv-03339-EJD
[Katten Muchin Rosenman]
Deposition
- Forever 21, Inc v. Gucci America, Inc, United States District Court, Central District of California, Western Division, No. 2:17-cv-4706 SJO (ex)
[Quinn Emanuel]
Deposition
- Video Gaming Technologies, Inc., v. Castle Hill Studios LLC (d/b/a Castle Hill Gaming); Castle Hill Holding LLC (d/b/a Castle Hill Gaming); and Ironworks Development, LLC (d/b/a Castle Hill Gaming), United States District Court for the Northern District of Oklahoma, No. 17-cv-00454-GKF-njx
[Covington Burling]
Deposition

2019

- Merck & co., Inc and Merck Sharp & Dohme Corp. v. Merck KGAA, United States District Court District of New Jersey, No. 2:16-cv-00266-ES-MAH
[Sidley Austin]
Deposition
- The Reinalt Thomas Corporation d/b/a Discount Tire v. Mavis Tire Supply LLC, United States District Court Northern District of Georgia Atlanta Division, No. 1:18-cv-05877-TCB
[Covington Burling]
Deposition
- Miller Coors, LLC v. Anheuser-Busch Company, LLC, United States District Court for the District of Wisconsin, No. 19-cv-218
[Brattle Group and Crowell Moring LLP]
Deposition
- Buckeye Tree Lodge and Sequoia Village Inn, LLC, et al., v. Expedia, INC, et al., United States District Court Northern District of California, No. 16-cv-04721-VC
[Covington Burling]
Deposition

APPENDIX A

Trial and/or Deposition Testimony 2018-2024

2020

- Federal Trade Commission v. LendingClub Corporation d/b/a LendingClub, United States District Court Northern District of California, San Francisco Division, No. 3:18-cv-02454
[Gibson Dunn & Kirkland Ellis]
Deposition
- Gianni Versace S.R.L v. Fashion Nova, INC, United States District Court Central District of California, Western Division, No. 2:19-cv-10074
[Paul Weiss]
Deposition
- American Airlines, INC v. Delta Airlines, INC, United States District Court for the Northern District of Texas, Fort Worth Division, No. 4:19-CV-01053-O
[Latham Watkins]
Deposition
- Duracell U.S. Operations, INC v. Energizer Brands, LLC, United States District Court Southern District of New York, No. 1:20-CV-07318-JPO
[Paul Weiss]
Deposition
- Get Kaiser, INC, Kaiser Fitness, LLC and Anna Kaiser v. AKT Franchise, LLC and Xponential Fitness, LLC, United States District Court for the District of Delaware, No. 20-1037-CFC
[Venable]
Deposition

2021

- Federal Trade Commission v. Fleetcor Technologies, INC, et al, United States District Court Northern District of Georgia, Atlanta Division, No. 1:19-cv-5727-AT
[Sidley Austin]
Deposition
- The People of the State of California v. Ashford University, LLC; Zovio, Inc; and Does 1, Superior Court of the State of California For the County of San Diego, No. 37-2018-00046134-CU-MC-CTL
[Sidley Austin]
Deposition and Trial
- FieldTurf Artificial Turf Marketing and Sales Practices Litigation, United States District Court of New Jersey, No. 3:17-md-02779-MAS-TJB
[Weil, Gotshal & Manges LLP]
Deposition
- Retained by a professional sports organization in connection with a confidential arbitration proceeding.
[Quinn Emanuel]
Deposition
- TherapeuticsMD, INC v. Evofem Biosciences, INC., United States District Court Southern District of Florida, West Palm Beach Division, No. 9:20-cv-82296
[Hackler Daghigian Martino & Novak]
Deposition
- Bobrick Washroom Equipment, INC v. Scranton Products, INC, No. 14-CV-00853-RDM (H.D. PA)
[Baker Law]
Deposition and Trial
- Bureau of Consumer Financial Protection v. Progrexion Marketing, INC, et al., No. 2:19-cv-00298-BSJ
[Goodwin Procter]
Deposition

Trial and/or Deposition Testimony 2018-2024

2022

- H&R Block. And HRB Innovations, INC. v. Block, INC., United States District Court for the Western District of Missouri, No. 4:21-cv-00913-NKL
[Quinn Emanuel]
Trial
- Luckenbach Texas, INC. v. Stewart Skloss, Stemma Holdings, L.P., Luckenbach Road Whiskey Distillery, LLC, Luckenbach Whiskey, LLC, LRW Ventures, LLC, Frontier Spirits, LLC, and Pura Vida Spirits Company, LLC,
United States District Court for the Western District of Texas Austin Division, No. 1:21-cv-00871-RP
[Crowell Moring]
Trial
- Luckenbach Texas, INC. v. Paul Engel, d/b/a Luckenbach Lodge, United States District Court for the Western District of Texas Austin Division, No. 1:19-cv-567
[Crowell Moring]
Deposition and Trial
- Nicole Krause-Pettai, Christy Stevens, Kevin Bolden, Errol Carreon, individually and on behalf of all others similarly situated, v. Unilever United States, INC., a corporation; and Does 1-10 inclusive, United States District Court Southern District of California, No. 3:20-cv-01672-DMS-BLM
[Shook Hardy Bacon]
Deposition

2023

- GOLO, LLC., v. Goli Nutrition, INC., a Canadian Corporation, Goli Nutrition, a Delaware Corporation, and Michael Bitenski, United States District Court for the District of Delaware, No. 20-667-RGA
[Global Business Experts Group and Sidley Austin]
Deposition and Trial
- AMARTE USA HOLDINGS INC, INC., A Delaware Corporation vs. KENDO HOLDIONGS INC., a Delaware Corporation, MARC JACOBS INTERNATIONAL, LLC, a Delaware Limited Liability Company, SEPHORA USA, INC., a Michigan Corporation, WALMART INC., a Delaware Corporation, THE NEIMAN MARCUS GROUP LLC, a Delaware Limited Liability Corporation, and NORDSTROM, INC., a Washington Corporation, United States District Court for the Northern District of California, No. 4:22-cv-08958-CRB
[IPLA]
Deposition

2024

- GERALD HAYDEN -against- INTERNATIONAL BUSINESS MACHINES CORPORATION, PABLO SUAREZ and SHANKER RAMAMURTHY, United States District Court Southern District of New York Case No. 7:21-CV-02485-VB
[Jones Day]
Deposition
- POST UNIVERSITY, INC., v. LEARNEO, INC., Civil Action No. 3:21-cv-01242 (JBA), United States District Court, District of Connecticut
[Getzbalich]
Deposition

Exhibit A-3



120 Fifth Avenue, New York, NY 10011
 TEL 212.633.1100 | FAX 212.633.6499
radiusinsights.com

Appendix 2: The Stimuli

Hidden City Stimuli:

Stimuli 1 for Skiplagged (Cell 1)

skiplagged Flights Stays Cars Rewards Deals Login

One Way ▾ 1 Traveler ▾

John Wayne Orange County Intl. ▾ Miami Intl., Miami, Florida ▾ Aug 3, 2024

Search Flights

LINE GRAPH PRICES ARE NOT REAL-TIME

Share

Price History

\$119 4 hours ago

Create a Price Alert

TYPE

Skiplagged

STOPS

Nonstop

Up to 1 stop

Up to 2 stops

TAKE OFF

12:00am 11:59pm

LANDING

12:00am 11:59pm

FLIGHT DURATION

2h 41m 5h 54m

LAYOVER DURATION

Please select your flight

Click here to reset all filters

	Price	Duration	Value	Total Cost
Skiplagged \$91 off	5h nonstop	8:49pm SNA	5:08am ⁺¹ MIA	\$264 \$173
Skiplagged \$133 off	16h 1 stop	12:45pm SNA	7:34am ⁺¹ MIA	\$294 \$181
Skiplagged \$83 off	9h 1 stop	7:25pm SNA	7:34am ⁺¹ MIA	\$293 \$190
Skiplagged \$118 off	14h 1 stop	12:45pm SNA	6:06am ⁺¹ MIA	\$314 \$196
	7h 1 stop	1:19pm SNA	11:46pm MIA	\$211
	8h 1 stop	10:10am SNA	9:08pm MIA	\$211
	9h 1 stop	11:30am SNA	11:46pm MIA	\$211

 Share X

Santa Ana - Miami
Saturday, August 3
5h19m | Nonstop | **Skipplagging** | 1 Traveler

AMERICAN AIRLINES  8:49p SNA ————— 5:08a⁺¹ MIA
Santa Ana to Miami | 5h19m | AA 298 |  BACKPACK ONLY

( 3h26m Layover in Miami (MIA))

AMERICAN AIRLINES  8:34a⁺¹ MIA ————— 10:18a⁺¹ BNA
Miami to Nashville | 2h44m | AA 3407

\$173
1 Adult | No Children Book Now

Important information about your flight!

This is a **hidden city ticket!**

That means you get out in Miami (MIA) and skip the following flight(s).

**Backpack only**

We recommend only bringing a backpack that can fit under the seat in front of you. Anything larger risks getting checked at the gate, and all checked bags will end up in Nashville!

I understand that I cannot check my bag(s)

**Bad weather**

In rare times of irregular operations such as bad weather, your itinerary may change at the discretion of the airline. If that happens, ask to be changed to a similar itinerary!

**Angry airlines**

Airlines don't like when you miss flights to save money so don't do this often.

I have read and understood these notes.

Proceed

 **skipplagged**

Flights Stays Cars Rewards Deals Login

You're saving **\$91** compared to other websites!
Plus you'll earn **\$10.11** cash back in travel credits.

Great! Just 3 simple steps and you'll be booking this flight with Skipplagged!

Free Cancellation
There's no fee to cancel within 24 hours of booking

Baggage Policy
Click here to check the baggage policy

Customer Support
800-433-7300 (by American Airlines)

Fare Class
Basic Economy Change

Traveler Information
First Last
Email: 123@abc.com
Phone: 2144563216 Change

Payment Information
Pay with Credit Card Use Travel Credit New

Skipplagged does not retain your credit card information. Data collected in this form is passed directly to the airline

Name on Card ...

Santa Ana - Miami
Saturday, August 3
5h19m | Nonstop | Skipplagged | 1 Traveler

AMERICAN AIRLINES
8:49p SNA — 5:08a MIA
5h19m | AA 298 | BACKPACK ONLY

(1) 8:26a Layover in Miami (MIA)

AMERICAN AIRLINES
8:34a MIA — 10:18a BNA
2h44m | AA 2407

Summary of Charges

1 Adult	\$172.60
Service Fee	\$35.00
<hr/>	
Total Charges	\$207.60

Rewards Earned \$10.11

This reservation will be processed in USD currency.

Stimuli 1 for Expedia (Cell 2)

Expedia Shop travel ▾ [Get the app](#) English List your property Support

One way ▾ 1 traveler ▾ Economy ▾

Flying from Orange County, CA (SNA-John ...) Flying to Miami, FL (MIA-Miami Intl.) Departing Aug 3 **Search**

Filter by

Choose departing flight > Review your trip

Stops From American Airlines ✕ Delta ✕ United ✕ Clear all filters

- Nonstop (1) \$264 Wed, Jul 31 \$174
- 1 Stop (24) \$211 Thu, Aug 1 **\$124**
- 2+ Stops (5) \$431 Fri, Aug 2 \$174
- Sat, Aug 3 **\$124**
- Sun, Aug 4 \$234
- Mon, Aug 5 \$174
- Tue, Aug 6 \$174

Prices may change based on availability and are not final until you complete your purchase. You can review any additional fees before checkout.

Airlines From Sort by Recommended

- American Airlines (16) \$264  Earn OneKeyCash on top of airline miles when you sign in and book a flight [Sign In](#)
- Alaska Airlines (9) \$431
- Delta (7) \$248
- United (7) \$211 Recommended departing flights [How our sort order works](#)
- Frontier Airlines (1) \$124
- Spirit Airlines (1) \$263 8:49pm - 5:08am ^{↓1} 5h 19m (Nonstop) \$264 Orange... (SNA) - Miami (MIA) American Airlines One way per traveler
- Seat choice included \$261 Carry-on included
- Carry-on bag included \$248 10:10am - 9:08pm 7h 58m (1 stop) \$211 Orange... (SNA) - Miami (MIA) 1h 52m in Houston (IAH) United One way per traveler
- No cancel fee \$311
- No change fee \$261 1:19pm - 11:46pm 7h 27m (1 stop) \$211 Orange... (SNA) - Miami (MIA) 1h 1m in Denver (DEN) United One way per traveler
- Morning (5:00am - 11:59am)
- Afternoon (12:00pm - 5:59pm)
- Evening (6:00pm - 11:59pm)
- Arrival time in Miami

Departure time in Orange County

Arrival time in Miami

 Expedia [Shop travel](#) [!\[\]\(04e86abb5feab5a3b330a0309e3fdd56_img.jpg\) Get the app](#) [!\[\]\(db8444079011ae0066874e6ba4c62105_img.jpg\) English](#) [List your property](#) [Support](#) [Trips](#) [!\[\]\(928a4fd18c4d4284e2869c40d1f57fab_img.jpg\)](#) [Sign in](#)

American Airlines - SNA → MIA > [Review your trip](#)
[Change flight](#)

 Stay flexible with no change fees
We recommend booking a flight with no change fees in case your plans change.
[Change flights](#)

Orange County to Miami
8:49pm - 5:08am (5h 19m, nonstop)
 American Airlines • Sat, Aug 3

Below average CO₂
[Show details](#)

Your fare: Basic Economy
 Upgrade for \$50 to get seat choice and no change fees.
[See upgrade options](#)

Price summary

Traveler 1: Adult	\$263.10
Flight	\$230.70
Taxes and fees ⓘ	\$32.40
Trip total	\$263.10

Rates are quoted in US dollars

[Check out](#)

 Free cancellation
There's no fee to cancel within 24 hours of booking.

Stimuli 2 for Skiplagged (Cell 1) and Expedia (Cell 2)


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TRAVEL INFORMATION
AADVANTAGE®
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DEPART

Santa Ana, CA to Miami, FL
Saturday, August 3, 2024

Wed, Jul 31	Thu, Aug 1	Fri, Aug 2	Sat, Aug 3	Sun, Aug 4	Mon, Aug 5	Tue, Aug 6
\$214	\$309	\$309	\$264	\$309	\$309	\$272

Filter by: **Stops** American Airlines 40 results

Depart	Arrive	Duration	Main	Premium
SNA MIA 5h 19m Nonstop 8:49 PM → 5:08 AM +1 AA 298 - 7M8-Boeing 737MAX 8 Passenger Details Seats			One way from \$264	One way from \$854
SNA MIA 6h 53m 1 stop 6:45 AM → 4:38 PM SNA - PHX - AA 486 - 7M8-Boeing 737MAX 8 Passenger PHX - MIA - AA 1816 - 7M8-Boeing 737MAX 8 Passenger Details Seats			One way from \$273	One way from \$1,012 1 seat left
SNA MIA 8h 38m 1 stop 6:45 AM → 6:23 PM SNA - DFW - AA 1382 - 738-Boeing 737			One way from \$273	One way from \$863 2 seats left



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Review and pay

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DEPART

Santa Ana, CA to Miami, FL

Saturday, August 3, 2024 to Sunday, August 4, 2024

Flight	Depart	Arrive	Travel time	Class	Seats
298 American Airlines	8:49 PM SNA	5:08 AM MIA	5h 19m	Basic Economy	Choose seats

Cost summary

Your trip total		Basic Economy (Non-refundable)		Basic Economy rules	
\$263.10		Passenger		Bag and optional fees	
Trip SNA / MIA	\$230.70	Taxes	\$32.40	Reservation and tickets FAQs	Price and Tax Information
Carrier-imposed fees	\$0.00	Total (all passengers)	\$263.10	Conditions of Carriage	

Stimuli 2 for Skiplagged (Cell 1)

<u>SKIPLAGGED SAYS...</u>	<u>AMERICAN AIRLINES SAYS...</u>
<p>What is Skiplagging or "hidden-city" flying?</p> <p>Skiplagging or hidden-city flying is where you get off at the layover rather than the final destination. For example, a flight from New York to Orlando might be \$250, but a similar flight from New York to Dallas with a layover in Orlando might be \$130. If you're going to Orlando, we'll show you both flights. If you choose the cheaper one, you get off the plane at the layover (Orlando) rather than going to the final ticketed destination (Dallas).</p> <p>This is perfectly legal and the savings can be significant, but there are <u>some things to be aware of</u>:</p> <ul style="list-style-type: none"> • Backpack only – We recommend only bringing a backpack that can fit under the seat in front of you. Anything larger risks getting checked at the gate, and all checked bags will end up in Dallas (final ticketed destination)! • Bring your passport for international flights (even if you're not going all the way to the final destination). Some carriers require a passport to board the plane. • You may need a visa for international flights. This depends on the country that's the final destination. In some cases, all you need is a passport, but you may also need a visa for some countries. • Don't associate a frequent flyer account – If you do, the airline might invalidate any miles you've accrued with them. • Some airlines may require proof of a return ticket during check-in. If this happens to you, just buy a refundable 	<p>We may not let you fly (temporarily or permanently) for any reason, including if you...fail to comply with American Airlines rules or policies.</p> <p>Prohibited booking practices</p> <p>Reservations made to exploit or circumvent fare and ticket rules are prohibited. Examples include (but are not limited to):</p> <ul style="list-style-type: none"> • Purchasing a ticket without intending to fly all flights to gain lower fares (<u>hidden city ticketing</u>) <p>If we find evidence that you or your agent are using a prohibited practice, we reserve the right to:</p> <ul style="list-style-type: none"> • Cancel any unused part of the ticket • Refuse to let the passenger fly and check bags • Not refund an otherwise refundable ticket • Charge you for what the ticket would have cost <p>Ticket Validity</p> <p>Your ticket is valid only when:</p> <ul style="list-style-type: none"> • Travel is to/from the cities on your ticket and in your trip record <p>Your ticket is not valid when:</p> <ul style="list-style-type: none"> • We find that the ticket was bought using an exploitative practice <p>Violation of applicable rules...is subject to...forfeiture of any and all AAdvantage® Rewards and Benefits in a member's account, as well as termination of the account and the member's future participation.</p>

<p>return ticket directly from the airline and cancel it ASAP after boarding.</p> <ul style="list-style-type: none">• Do not overuse hidden-city itineraries. Do not fly hidden-city on the same route with the same airline dozens of times within a short time frame.• In rare times of irregular operations such as bad weather, your itinerary may change at the discretion of the airline (2% chance).• You might upset the airline, so don't do this often.	
--	--

Non-Hidden City Stimuli:Stimuli 1 for Skiplagged (Cell 1)

skiplagged Flights Stays Cars Rewards Deals Login

One Way 1 Traveler

Philadelphia Intl, Philadelphia, PA San Francisco Intl, San Francisco, CA May 1, 2024 Search Flights LINE GRAPH PRICES ARE NOT REAL-TIME

Please select your flight

Click here to reset all filters

Price	Duration	Value	Total Cost
6h nonstop	6:26pm PHL	9:40pm SFO	\$140
6h nonstop	6:50pm PHL	10:18pm SFO	\$140
8h 1 stop	7:05am PHL	12:34pm SFO	\$144
9h 1 stop	6:14pm PHL	12:09am *1 SFO	\$144
11h 1 stop	3:19pm PHL	11:24pm SFO	\$144
9h 1 stop	1:35pm PHL	7:42pm SFO	\$148

Philadelphia - San Francisco
Wednesday, May 1
6h28m | Nonstop | 1 Traveler

AMERICAN AIRLINES
6:50p PHL ————— 10:18p SFO
Philadelphia to San Francisco | 6h28m | AA 756

\$140
1 Adult | No Children Book Now

 **skiplagged**

[Flights](#) [Stays](#) [Cars](#) [Rewards](#) [Deals](#) [Login](#)



Sign in and earn 1.8% cash back in travel credits!
You will be able to redeem your credits towards flights & hotels.

[Sign In](#)

Great! Just 3 simple steps and you'll be booking this flight with Skiplagged!

 **Free Cancellation**
There's no fee to cancel within 24 hours of booking

 **Baggage Policy**
Click here to check the baggage policy

 **Customer Support**
800-433-7300 (by American Airlines)

 **Fare Class**
Basic Economy

[Change](#)

 **Traveler Information**
First Last

Email
123@abc.com

Phone
2144561234

[Change](#)

Philadelphia - San Francisco
Wednesday, May 1
6h28m | Nonstop | 1 Traveler

AMERICAN AIRLINES  6:50p PHL 10:18p SFO
6h28m | AA 756

Summary of Charges	
1 Adult	\$139.10
Service Fee	\$10.00
Total Charges	\$149.10
Rewards Earned	\$2.82

This reservation will be processed in USD currency.

3 Payment Information

[Pay with Credit Card](#) New

 Use Travel Credit

Skiplagged does not retain your credit card information. Data collected in this form is passed directly to the airline

Name on Card

Card Number

[Feedback](#)

Stimuli 1 for Expedia (Cell 2)

Expedia Shop travel ▾ [Get the app](#) English List your property Support Trips Sign in

One way ▾ 1 traveler ▾ Economy ▾

Flying from Philadelphia, PA (PHL-Philadelphia) Flying to San Francisco, CA (SFO-San Fran) Departing May 1

Search

Filter by

Choose departing flight > Review your trip

Clear all filters

Stops

From	American Airlines	United	Delta
\$140	\$170	\$124	\$66
\$144	\$144	\$144	\$82
Sun, Apr 28	Mon, Apr 29	Tue, Apr 30	Wed, May 1
			\$90
			Thu, May 2
			\$90
			Fri, May 3
			\$90
			Sat, May 4
			\$90

Airlines

From	Sort by
American Airlines (29)	Price (lowest to highest)
United (21)	
Delta (10)	
Alaska Airlines (4)	
Frontier Airlines (2)	
JetBlue Airways (2)	

Earn OneKeyCash on top of airline miles when you sign in and book a flight [sign in](#)

Travel and baggage

From	6:26pm - 9:40pm	6h 14m (Nonstop)	\$140
\$140	Philad... (PHL) - San Fr... (SFO)	6h 14m (Nonstop)	One way per traveler
\$144	United		
\$291			
\$82			
\$107			

Departure time in Philadelphia

Morning (5:00am - 11:59am)	Afternoon (12:00pm - 5:59pm)
6:50pm - 10:18pm	7:05am - 12:34pm
Philad... (PHL) - San Fr... (SFO)	Philad... (PHL) - San Fr... (SFO)
American Airlines	Delta
Carry-on included	Carry-on included
8h 28m (Nonstop)	8h 29m (1 stop)
	1h 13m in Salt Lake City (SLC)
\$140	\$144
One way per traveler	One way per traveler
6:14pm - 12:09am +1	8h 55m (1 stop)
Philad... (PHL) - San Fr... (SFO)	1h 45m in Minneapolis (MSP)
Delta	
Carry-on included	
\$144	\$144
One way per traveler	One way per traveler

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American Airlines · PHL → SFO > [Review your trip](#)
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 Stay flexible with no change fees
We recommend booking a flight with no change fees in case your plans change.
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Philadelphia to San Francisco
6:50pm - 10:18pm (6h 28m, nonstop)
American Airlines • Wed, May 1

Below average CO₂
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Your fare: Basic Economy
 Upgrade for \$50 to get seat choice and no change fees.
[See upgrade options](#)

Price summary

Traveler 1: Adult	\$139.10
Flight	\$115.35
Taxes and fees ⓘ	\$23.75
Trip total	\$139.10

Rates are quoted in US dollars

Check out

 **Free cancellation**
There's no fee to cancel within 24 hours of booking.

Stimuli 2 for Skiplagged (Cell 1) and Expedia (Cell 2)


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DEPART

Philadelphia, PA to San Francisco, CA
Wednesday, May 1, 2024

Mon. Apr 29	Tue. Apr 30	Wed. May 1	Thu. May 2	Fri. May 3	Sat. May 4	Sun. May 5
\$169	\$140	\$140	\$160	\$160	\$160	\$354

Filter by: Nonstop only American Airlines [Clear filters | 3 results](#)

Depart	Arrive	Duration	Main	Premium	
PHL	SFO	6h 28m	Nonstop	One way from \$140	
6:50 PM → 10:18 PM				One way from \$576 2 seats left	
AA 756 · 32Q-Airbus A321neo					
Details	Seats				

PHL	SFO	6h 20m	Nonstop	One way from \$220	One way from \$815
3:50 PM → 7:10 PM					
AA 2370 · 32Q-Airbus A321neo					
Details	Seats				

PHL	SFO	6h 18m	Nonstop	One way from \$270	One way from \$934 1 seat left
8:20 AM → 11:38 AM					
AA 2407 · 32Q-Airbus A321neo					
Details	Seats				



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Philadelphia, PA to San Francisco, CA

Wednesday, May 1, 2024

Flight	Depart	Arrive	Travel time	Class	Seats
756 American Airlines	6:50 PM PHL	10:18 PM SFO	6h 28m	Basic Economy	Choose seats

Cost summary

Your trip total	\$139.10	Basic Economy (Non-refundable)
Includes taxes, charges and carrier-imposed fees		Basic Economy rules
Starting at \$13/mo with Learn more		Bag and optional fees
		Reservation and tickets FAQs
		Price and Tax Information
		Conditions of Carriage

Exhibit A-4

1 IN THE UNITED STATES DISTRICT COURT
2 FOR THE NORTHERN DISTRICT OF TEXAS
3 FORT WORTH DIVISION

4 - - -
5 AMERICAN AIRLINES, INC., :
6 Plaintiff, :
7 -vs.- :
8 SKIPLAGGED, INC., : CIVIL ACTION NO:
9 Defendant. : 4:23-cv-00860-P
10 - - -
11 Monday, July 8, 2024
12 - - -
13 In-person oral deposition of DR. YORAM
14 (JERRY) WIND, taken pursuant to notice, was held at
15 the Law Offices of Greenberg & Traurig, LLP, 1717 Arch
16 Street, Suite 400, Philadelphia, Pennsylvania 19103, at
17 9:30 a.m., on the above date, before Lisa DePascale, a
18 Court Reporter and Notary Public of the Commonwealth
19 of Pennsylvania and Delaware.

20
21
22

23 VERITEXT
24 888.777.6690 / 215.214.1000
25 Calendar-pa@veritext.com

Page 1

1 APPEARANCES:	1	- - -
2 GREENBERG TRAURIG, LLP	2	DEPOSITION SUPPORT INDEX
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4 77 West Wacker Drive	4	
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9 Representing Plaintiff, American Airlines	9	
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23 817.818.3524	23	
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15 Representing Plaintiff, American Airlines		
16		
17		
18 ALSO PRESENT: AKTARER ZAMAN, CEO		
19 Skiplagged, Inc.		
20 JEREMY BALLEW, ESQUIRE		
21 American Airlines		
22		
23		
24		

Page 2

Page 4

1 INDEX	1	(It is hereby stipulated and agreed by
2 WITNESS:	2	and among counsel for the respective parties
3 DR. YORAM (JERRY) WIND,	3	that sealing, certification, and filing are
4 PAGE NO.	4	waived; and that all objections, except as to
5 MR. REED5	5	the form of the question, are reserved until
6 MR. NELSON256	6	the time of trial.)
7	7	- - -
8 EXHIBITS	8	DR. YORAM (JERRY) WIND, after having
9 NUMBER DESCRIPTION PAGE NO.	9	been first duly sworn, was examined and
10 Wind-1 Notice of Intention to Take 7	10	testified as follows:
11 the Oral Deposition of Jerry	11	- - -
12 Wind-2 Appendix B, 9	12	E X A M I N A T I O N
13 Documents/Materials Relied	13	- - -
14 Wind-3 Plaintiff American Airlines, 10	14	BY MR. REED:
15 Inc.'s Designation of Expert	15	Q. Good morning, Dr. Wind. My name is Kendall
16 Witnesses, 6 pages	16	Reed. We've never met before, have we?
17 Wind-4 Wharton University of 35	17	A. No.
18 Pennsylvania, Appendix A, 124	18	Q. All right. Can you state your name for the
19 pages	19	record?
20 Wind-5 Expert Report of Expert, 50	20	A. Yoram Jerry Wind.
21 Yoram (Jerry) Wind, 90 pages	21	Q. And where do you currently reside?
22 Wind-6 Radius, Appendix C-2, 16 109	22	A. [REDACTED]
23 pages	23	Q. And how many times have you been deposed
24 Wind-7 E-mail, Bates stamped 249	24	before?

Page 3

Page 5

2 (Pages 2 - 5)

<p>1 or twice; is that what you said?</p> <p>2 A. At least, yeah. A few times.</p> <p>3 MR. NELSON: Objection;</p> <p>4 mischaracterizes.</p> <p>5 BY MR. REED:</p> <p>6 Q. A few times.</p> <p>7 And you said you read the complaint?</p> <p>8 A. Yes.</p> <p>9 Q. And you're referring to the complaint filed by</p> <p>10 American Airlines in this lawsuit, correct?</p> <p>11 A. Correct.</p> <p>12 Q. You start off by saying, "Skiplagged, Inc. owns</p> <p>13 and operates the website Skiplagged.com" in that first</p> <p>14 sentence?</p> <p>15 A. Yeah.</p> <p>16 Q. Did you do anything to verify that Skiplagged,</p> <p>17 Inc. owns and operates the website Skiplagged.com?</p> <p>18 A. No.</p> <p>19 Q. "One to say that Skiplagged is not an</p> <p>20 authorized agent of American."</p> <p>21 Did I read that correctly?</p> <p>22 A. Yes.</p> <p>23 Q. What did you do to verify whether Skiplagged</p> <p>24 was an authorized agent of American?</p>	<p>1 Q. You were told by counsel that that was a</p> <p>2 violation of those contracts and you believed it and</p> <p>3 assumed it, right?</p> <p>4 A. Right.</p> <p>5 Q. But you have no independent knowledge of</p> <p>6 whether other agents of American sharing data on</p> <p>7 American flights is a violation of their contract, do</p> <p>8 you?</p> <p>9 A. I don't.</p> <p>10 Q. You go on to say that "Skiplagged developed</p> <p>11 computer programs to obtain this information from</p> <p>12 American's website."</p> <p>13 That's something that you were told by</p> <p>14 counsel?</p> <p>15 A. Everything in this section by background I was</p> <p>16 told by counsel.</p> <p>17 Q. Okay. And you did nothing to verify whether</p> <p>18 Skiplagged has a computer program to obtain</p> <p>19 information from American's website, did you?</p> <p>20 A. Correct. Because I say no need to verify</p> <p>21 anything that counsel told me.</p> <p>22 Q. You assumed it was correct?</p> <p>23 A. Correct.</p> <p>24 Q. You go on to say "Skiplagged.com allows users</p>
Page 54	Page 56

<p>1 A. Nothing. I basically trusted my counsel to</p> <p>2 give me the correct information.</p> <p>3 Q. Okay. So you say "Skiplagged obtains data on</p> <p>4 American flights by obtaining data from other agents</p> <p>5 of American, an apparent violation of their contracts</p> <p>6 with American and/or by developing computer programs</p> <p>7 to obtain this information from American's website."</p> <p>8 All right. How do you know that</p> <p>9 Skiplagged obtains data on American flights by</p> <p>10 obtaining data from other agents of American?</p> <p>11 A. The same source, the source for everything in</p> <p>12 the background section is from my counsel.</p> <p>13 Q. Is from Greenberg?</p> <p>14 A. Correct.</p> <p>15 Q. Okay. And you did nothing to verify whether</p> <p>16 that information was correct or not, did you?</p> <p>17 A. I saw no need to do it.</p> <p>18 Q. You assumed it was correct?</p> <p>19 A. Yes.</p> <p>20 Q. Okay. You go on to state, "An apparent</p> <p>21 violation of their contracts with American."</p> <p>22 Have you reviewed any contracts between</p> <p>23 American and its authorized agents?</p> <p>24 A. No. I did not see any need for doing that.</p>	<p>1 to search for, identify and purchase and book American</p> <p>2 flights directly on Skiplagged.com."</p> <p>3 Do you see that sentence?</p> <p>4 A. Yes.</p> <p>5 Q. That's again, something you were told by</p> <p>6 counsel and you assumed it to be correct?</p> <p>7 A. Yeah. But that's also -- yes, but that's also</p> <p>8 something you can observe from going over their</p> <p>9 website.</p> <p>10 Q. Okay. You can observe that by purchasing a</p> <p>11 ticket on Skiplagged.com?</p> <p>12 A. Well, you can go through the website and you</p> <p>13 can definitely see that everything described here is</p> <p>14 correct.</p> <p>15 Q. As part of your work on this case and</p> <p>16 formulating your opinions, did you actually ever</p> <p>17 purchase a ticket on Skiplagged.com?</p> <p>18 A. No, I did not.</p> <p>19 Q. Did anyone on your behalf do so?</p> <p>20 A. No.</p> <p>21 Q. Anyone with Wind Associates purchase a ticket</p> <p>22 on Skiplagged.com?</p> <p>23 A. No.</p> <p>24 Q. Did anyone at Radius purchase a ticket on</p>
Page 55	Page 57

15 (Pages 54 - 57)

<p>1 Skiplagged.com?</p> <p>2 A. Not to my knowledge.</p> <p>3 Q. Did anyone as part of their work for you at</p> <p>4 Soluble -- or not Soluble -- Voluble purchase a ticket</p> <p>5 on Skiplagged.com?</p> <p>6 A. Not to my knowledge.</p> <p>7 Q. So everything in that paragraph there is</p> <p>8 something that you were told and you assumed, correct?</p> <p>9 MR. NELSON: Objection;</p> <p>10 mischaracterizes.</p> <p>11 THE WITNESS: Well, with the exception</p> <p>12 of the items that I could observe also by going</p> <p>13 to their website.</p> <p>14 BY MR. REED:</p> <p>15 Q. Okay. But you didn't go through the whole</p> <p>16 process and actually purchase a ticket, did you?</p> <p>17 A. Correct.</p> <p>18 Q. Going to page 4, starting with that first full</p> <p>19 paragraph, having reviewed the complaint?</p> <p>20 A. Yeah.</p> <p>21 Q. Are you with me?</p> <p>22 You state, "Having reviewed the</p> <p>23 complaint and various screenshots of American's and</p> <p>24 Skiplagged's websites." And then it goes on from</p>	<p>1 Q. With Greenberg?</p> <p>2 A. Correct.</p> <p>3 Q. So having reviewed the complaint, the</p> <p>4 screenshots provided by Greenberg, you then went on</p> <p>5 and designed the consumer survey experiments, correct?</p> <p>6 MR. NELSON: Objection to form.</p> <p>7 THE WITNESS: Correct.</p> <p>8 BY MR. REED:</p> <p>9 Q. Okay. Did you write the report?</p> <p>10 A. Yes.</p> <p>11 Q. Did you have any assistance?</p> <p>12 A. Radius filled the exhibits, I designed the</p> <p>13 exhibits and Radius actually filled the exhibits with</p> <p>14 the data.</p> <p>15 Q. Okay.</p> <p>16 A. And Radius prepared the appendices that were</p> <p>17 submitted.</p> <p>18 Q. All right. Did anyone edit your report?</p> <p>19 A. No.</p> <p>20 Q. Other than yourself, I mean, anyone outside of</p> <p>21 you edit the report?</p> <p>22 A. No. I sent the report, obviously, to counsel</p> <p>23 and they may have suggested a few things, I don't</p> <p>24 recall. And that was my -- I wrote it. I edit it and</p>
<p>Page 58</p> <p>1 there. I want to ask you specifically about that.</p> <p>2 The various screenshots of American's</p> <p>3 and Skiplagged's websites, what are you referring to</p> <p>4 there?</p> <p>5 A. (Reviewing document.)</p> <p>6 In addition to the complaint and the</p> <p>7 website, I also looked at some screenshots of American</p> <p>8 and Skiplagged website, especially the screenshots</p> <p>9 referring to the stimuli that I used in the study.</p> <p>10 Q. Okay. These screenshots, are those included in</p> <p>11 your Appendix B?</p> <p>12 A. They are included as part of my report, as the</p> <p>13 one we selected, they're included -- they are the</p> <p>14 stimuli in the study, and they're the ones that's</p> <p>15 referred to in the report of the item you highlighted</p> <p>16 before with the Excel spreadsheet, was then there were</p> <p>17 some screenshots.</p> <p>18 Q. Okay. The various screenshots of American's</p> <p>19 and Skiplagged's websites, are those screenshots that</p> <p>20 you actually went and made or were they provided to</p> <p>21 you?</p> <p>22 A. They were provided to me.</p> <p>23 Q. Who provided those to you?</p> <p>24 A. Zach.</p>	<p>Page 60</p> <p>1 I finalize it.</p> <p>2 Q. Okay. All right. So do you recall how many</p> <p>3 drafts you prepared?</p> <p>4 A. Basically it is an ongoing process. As the</p> <p>5 data comes in I add stuff, so it's sort of -- it's a</p> <p>6 dynamic process of creating a report as data comes in.</p> <p>7 Q. As part of your analysis, did you reach any</p> <p>8 conclusions that did not make your report?</p> <p>9 A. No.</p> <p>10 Q. Were you asked for any opinions or topics that</p> <p>11 are not addressed in the report?</p> <p>12 A. No.</p> <p>13 Q. All right. Other than the background</p> <p>14 information and the assumptions that we've talked</p> <p>15 about based upon the background, were there any other</p> <p>16 assumptions that you made as part of your analysis?</p> <p>17 A. No.</p> <p>18 Q. You said no?</p> <p>19 A. No.</p> <p>20 Q. You weren't asked to assume anything other than</p> <p>21 that the background information you were provided was</p> <p>22 true?</p> <p>23 MR. NELSON: Objection;</p> <p>24 mischaracterizes.</p>

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Page 61

16 (Pages 58 - 61)

1 THE WITNESS: I think I lost the
 2 question. What is the question?
 3 BY MR. REED:
 4 Q. Okay. Sometimes that happens when we have the
 5 back and forth.
 6 You state a designed multiple consumer
 7 survey experiment to evaluate. And then it starts
 8 one, and you go for a while, and then a two.
 9 A. Right.
 10 Q. Were those the goals of your survey
 11 experiments?
 12 A. Yeah. To find out to what extent there is
 13 confusion and there is deception.
 14 Q. Okay.
 15 A. And how serious it is.
 16 Q. And those were the -- that was the direction in
 17 which you were hired by Greenberg to do, right?
 18 A. No. It's stated what explicitly also in the
 19 section objectives.
 20 Q. Going on in the next section, right?
 21 A. Correct.
 22 Q. Okay. Where you said you were retained by
 23 Greenberg Traurig and Kelly Hart and Hallman to assess
 24 to what extent, that section, right?

Page 66

1 A. The requirements are reflected in my design.
 2 Q. What are those?
 3 A. My design address all the requirement. You
 4 know, to have the relevant universe, to select the
 5 right sample, to design, to select the right stimuli,
 6 to have the right experiment of design, which was in
 7 this case would include the control to design the
 8 appropriate questionnaire on bias questions, to
 9 analyze it correctly. So all the phases that everyone
 10 goes through in designing a study.
 11 Q. Are these requirements to your knowledge,
 12 reflected in any authority, scholarly article,
 13 treatise?
 14 A. They're reflected in most books and articles on
 15 marketing research. It's pretty fundamental.
 16 Reflected, from a legal point of view, legal word of
 17 Shari Diamond, if you look at her book. So, yeah, if
 18 you look at McCarthy, you will -- so, yeah, these are
 19 well accepted principles that guide all research in
 20 this area.
 21 Q. So Shari Diamond?
 22 A. Yes.
 23 Q. What's the name of that book?
 24 A. I don't recall the name of the book.

Page 68

1 A. Correct.
 2 Q. Okay. And that is reflected in what you were
 3 trying to evaluate in the previous paragraph, right?
 4 A. Correct.
 5 Q. Prior to or in the process of designing your
 6 experiments, did you consult any treatises, scholarly
 7 article, any other authorities to aid in your design?
 8 A. No. The same answer as I gave you with respect
 9 to the time period for respondents. I've done
 10 thousands of studies. I've taught marketing research.
 11 I don't have to go and look for, you know, help from
 12 books on the topic. I wrote the books on the topic.
 13 Q. Okay. What are the requirements for designing
 14 a consumer experiment?
 15 A. As I said, I conducted thousands of studies,
 16 evaluated tens of thousands of studies. I know how to
 17 design studies. That's a straightforward study to
 18 assess confusion and to determine if there is any
 19 deception or not.
 20 Q. I understand you've done it for quite some
 21 time. My question is a little different.
 22 As part of your experience, is there
 23 any requirements when you're designing a consumer
 24 experiment?

Page 67

1 Q. You said McCarthy?
 2 A. No. They're two separate books. There is a
 3 McCarthy book that refers to some research studies.
 4 And Shari Diamond focuses specifically on consumer
 5 surveys in her book originally, in the article and in
 6 the book. There is a more recent book.
 7 Q. The McCarthy book, what's it called?
 8 A. I don't recall the name.
 9 Q. You didn't consult either one when doing this
 10 work, it's just these are ones that you're referring
 11 to.
 12 A. Because I'm familiar with them and I've used
 13 them in the past. There is no need to waste the
 14 client time going through all the books and stuff that
 15 I'm familiar with.
 16 Q. All right. You ran through them kind of
 17 quickly, so I want to make sure that I have them
 18 correct here. You said you want to select the
 19 relevant universe?
 20 A. Correct.
 21 Q. What does that mean?
 22 A. What we discussed before, who are going to be
 23 the respondents.
 24 Q. Okay. And then select the right stimuli?

Page 69

18 (Pages 66 - 69)

1 Q. You didn't provide that data, did you?
 2 A. No. I did not get it. I basically asked them
 3 to do the search, find out if there are any and then
 4 to give me illustrative and that's the analysis they
 5 provided.
 6 Q. They gave you those and then you put them in
 7 this report?
 8 A. Correct.
 9 Q. The analysis of putting them -- did you
 10 identify them as being deceptive or confusion or
 11 deceptive and confusion?
 12 A. Well, I think what I did, when I work with them
 13 is on the topic, which are on page 67, this is
 14 believing that Skiplagged is an agent of another
 15 airline, that the luggage was sent to the wrong
 16 destination, with a dishonest ticket, had to pay extra
 17 for it, the cost was higher than expected, passport
 18 issues, or general dissatisfaction.
 19 Q. And only one here was agent, right?
 20 A. That's from the search they did, they did a few
 21 days of work and that's what they found. I'm sure if
 22 we will kind of expand the search to cover the
 23 Facebook and others and spend more time and do it more
 24 systematically we will find many more. These are

Page 210

1 American, that he is checking in American and
 2 never realized that he's going through
 3 Skiplagged. And was totally surprised
 4 apparently by the fact that he got a Hidden
 5 City ticket.
 6 BY MR. REED:
 7 Q. That's the way you interpreted it?
 8 A. Yes.
 9 Q. Okay. How do you know it was a Hidden City
 10 ticket?
 11 A. Because I think that the restrictions on bag is
 12 only on Hidden City.
 13 Q. So you made that inference based upon, I can't
 14 check my bag?
 15 A. Yes.
 16 Q. Okay. The next comment where you have under
 17 believing Skiplagged, I guess it is, it has a 6. It
 18 goes 1 to 6. Is there missing ones?
 19 A. Some, like this, might have been lost in the
 20 production of the document.
 21 Q. Okay. You have "@AKhadiDon," downloaded --
 22 "download the Skiplagged app, all flights are cheaper,
 23 an yes, it's legit." And you interpreted that to
 24 mean, he thought or he or she, whoever, the poster

Page 212

1 illustrative of problems you will see on the social
 2 network.
 3 Q. Well, this social media individuals not a -- is
 4 this the author down here on the next page? I was a
 5 little confused.
 6 A. (Reviewing document.)
 7 Yes.
 8 Q. Okay.
 9 A. For some reason it was printed wrong.
 10 Q. Okay. And now, in that comment, the poster
 11 didn't actually say that Skiplagged was an agent of
 12 American, right?
 13 A. I'm sorry. What was the question?
 14 Q. Well, let me -- the comment is while I
 15 accidentally booked my flight through Skiplagged instead
 16 of American and now I can't check my bag, correct?
 17 A. Yeah.
 18 Q. Where in that does the comment say, I believe
 19 Skiplagged is an agent of American, right?
 20 MR. NELSON: Objection;
 21 mischaracterizes.
 22 THE WITNESS: No, this implied to me,
 23 it clearly implies that this person thought
 24 that because in looking at this everything is

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1 believed that Skiplagged was an agent of American?
 2 A. Yes.
 3 Q. Why?
 4 A. Because he said, yes, it's legit. He believed
 5 that this is a legit place to buy the American Airline
 6 ticket, which has to be only through authorized
 7 agents.
 8 Q. To your knowledge a user of the Skiplagged
 9 website, is there only option after they search for a
 10 flight, to buy that flight through Skiplagged?
 11 A. No. They have other options.
 12 Q. What are they?
 13 A. They cannot buy. If they decide not to buy.
 14 Q. Okay. Other than not buying, what other
 15 options?
 16 A. I think they can go through another third-party
 17 agent.
 18 Q. Okay. Another option might be they could go
 19 directly to American and purchase it there, right?
 20 A. They can, but even though the incentive,
 21 obviously, is in the Skiplagged because of the ease
 22 just to continue and buy it then on Skiplagged.
 23 Q. As part of your analysis, did you see or look
 24 for any studies that show numbers of consumers that

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54 (Pages 210 - 213)

<p>1 way did your study show harm to American?</p> <p>2 A. In multiple ways.</p> <p>3 Q. Okay.</p> <p>4 A. First of all, they show that consumers confuse</p> <p>5 and believe that American is associated with</p> <p>6 Skiplagged, which means it's a major damage and harm</p> <p>7 to American by losing control over their own brand,</p> <p>8 which is the key for different branding. You should</p> <p>9 be able to control the future of your brand. And here</p> <p>10 because consumers associate American with Skiplagged,</p> <p>11 anything that Skiplagged does can be attributed to</p> <p>12 American and tarnish their reputation. So there is a</p> <p>13 huge harm here to American.</p> <p>14 Q. And did your study at all quantify that harm?</p> <p>15 A. No.</p> <p>16 Q. Okay.</p> <p>17 A. We don't design to quantify. But my study</p> <p>18 clearly shows huge percentage of confusion among the</p> <p>19 highest levels in any study that I've done over the</p> <p>20 years.</p> <p>21 And the 70 percent confusion as to</p> <p>22 association, which is absolutely huge. And then in</p> <p>23 other words, the important finding here, when you look</p> <p>24 at this data, they're close similarity to the</p>	Page 246	<p>1 American?</p> <p>2 A. Yes. Because it's not the percentage, it is</p> <p>3 the magnitude. We're talking about the complaints to</p> <p>4 Skiplagged with 12,000 complaints about deception or</p> <p>5 confusion. That's a huge number of actual complaints</p> <p>6 that you rarely see in confusion cases in this</p> <p>7 country.</p> <p>8 Q. Out of how many?</p> <p>9 A. It doesn't make a difference. Look at the</p> <p>10 number. Look at the number of 12,000. That's huge.</p> <p>11 Q. So just the number matters, not as to that</p> <p>12 percentage of customers that are complaining or the</p> <p>13 percentage of even complaints?</p> <p>14 A. The number doesn't make as much difference here</p> <p>15 because there is the theory, which was clearly</p> <p>16 validated over years on the tip of the iceberg that</p> <p>17 I'm referring to in my report, where most people don't</p> <p>18 bother to complain. And the few that complain are</p> <p>19 typically represented a very large percentage of the</p> <p>20 population. And I don't think I've seen in any other</p> <p>21 study 12,000 actual complaint. That's huge. That's a</p> <p>22 huge number. So I believe, based on the study they</p> <p>23 I've conducted and the report, that American Airlines</p> <p>24 is seriously hurt by the existence of Skiplagged.</p>
<p>1 association was a legitimate travel agent like</p> <p>2 Expedia. There was hardly any difference between the</p> <p>3 two. So that's a huge harm to American.</p> <p>4 And then based on all of my marketing</p> <p>5 expertise and knowledge, you know, when we have such</p> <p>6 high level of confusion, this is a major harm for the</p> <p>7 company because they loose control over their brand.</p> <p>8 Q. Did your study ask any questions as to negative</p> <p>9 statements or negative impact on your respondents in</p> <p>10 their perception of American?</p> <p>11 A. No. But that's the reason we have always have</p> <p>12 analysis with complaints. So number one, is that we</p> <p>13 did not ask explicitly the perception of American.</p> <p>14 But if you look at the verbatim, Exhibit C7, I</p> <p>15 believe, that lists a lot of the -- all of the</p> <p>16 respondents, all the verbatim. You'll see that there</p> <p>17 are a number of them that mention kind of negative</p> <p>18 implication to American. And we reviewed the</p> <p>19 complaints. Many of them address with negative</p> <p>20 implications to American.</p> <p>21 Q. If the complaints that you've identified</p> <p>22 regarding Skiplagged to American are less than 1</p> <p>23 percent of the complaints received by American, is</p> <p>24 your opinion still the same, that the harm is huge to</p>	Page 247	<p>1 Q. Do you have you any publication, authority or</p> <p>2 whatnot, that tells you that 12,000 complaints is a</p> <p>3 huge number?</p> <p>4 A. No. I've not seen any publication that has a</p> <p>5 specific numbers of complaint in this specific context</p> <p>6 for this complaint.</p> <p>7 - - -</p> <p>8 (Exhibit Wind-7, E-mail, Bates stamped</p> <p>9 AA-SKP-00052794 through AA-SKP-0052797, was</p> <p>10 marked for identification.)</p> <p>11 - - -</p> <p>12 BY MR. REED:</p> <p>13 Q. I've handed you what's been marked as Exhibit 7</p> <p>14 for your deposition. You'll see that it's Bates</p> <p>15 labeled AA-SKP-00052794 through 52797.</p> <p>16 When you have a minute to look at it,</p> <p>17 let me know when you're ready for me to ask questions.</p> <p>18 A. (Reviewing document.)</p> <p>19 Yes.</p> <p>20 Q. Are you familiar with this document?</p> <p>21 A. No.</p> <p>22 Q. It's one listed on your appendix as documents</p> <p>23 and materials you relied upon?</p> <p>24 A. I reviewed a lot of material. I don't recall</p>

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<p>1 BY MR. NELSON:</p> <p>2 Q. Okay. And for the American side of that</p> <p>3 stimuli, did you find that information on American's</p> <p>4 website?</p> <p>5 A. Website and whatever other documents they were.</p> <p>6 They were primarily focusing on their condition of</p> <p>7 sales or whatever they call it.</p> <p>8 Q. Okay. We talked a little bit about the 12,000</p> <p>9 or so complaints that Skiplagged has received. As a</p> <p>10 consulting expert in your field, have you worked with</p> <p>11 many companies on the subject of consumer complaints?</p> <p>12 A. Yes.</p> <p>13 Q. How many companies would you say you've worked</p> <p>14 with where you were privy to the number of complaints</p> <p>15 that the company received?</p> <p>16 A. A variety of areas, one or two dozen.</p> <p>17 Q. Okay. And have you ever seen any company in</p> <p>18 your professional experience that had 12,000</p> <p>19 complaints?</p> <p>20 MR. REED: Objection to form.</p> <p>21 THE WITNESS: Not on a given topic.</p> <p>22 But there are a lot of complaints. There is a</p> <p>23 lot of complaints, you know, I couldn't reach</p> <p>24 you know, kind of, I didn't get my bill in</p>	Page 258	<p>1 those companies had a department dedicated for this,</p> <p>2 that continues analysis of complaints. And the</p> <p>3 analysis involves a faster response to the customer as</p> <p>4 possible but equally important analyzing it and seeing</p> <p>5 what amount are current practices has to be changed or</p> <p>6 modified to try to prevent things like this from</p> <p>7 happening in the future.</p> <p>8 Q. Okay.</p> <p>9 MR. NELSON: All right. I don't have</p> <p>10 any further questions.</p> <p>11 MR. REED: I have nothing further.</p> <p>12 (Deposition concluded at 5:04 p.m.)</p>	Page 260
<p>1 time. So companies get tons of complaints.</p> <p>2 But I've never seen a focused large number of</p> <p>3 complaints on a topic such as deception or poor</p> <p>4 service or other area that people are</p> <p>5 complaining to.</p> <p>6 So there are two -- my experience is in</p> <p>7 the two areas. One is in cases involved</p> <p>8 litigation, which I've never seen such high</p> <p>9 numbers. And in other cases, not involving</p> <p>10 litigation. And especially the ones not</p> <p>11 involving litigation, it's typically trying --</p> <p>12 coming from companies who are trying to improve</p> <p>13 their system and improve the system of dealing</p> <p>14 with complaints and how can you prevent such</p> <p>15 complaints in the future by redesigning their</p> <p>16 systems.</p> <p>17 BY MR. NELSON:</p> <p>18 Q. What does a company that's genuinely trying to</p> <p>19 prevent complaints, what are the steps that that</p> <p>20 company needs to take?</p> <p>21 A. Well, first of all, the culture that says our</p> <p>22 focus is to try to meet customers needs, minimize</p> <p>23 complaints, try to do the right thing. So it's really</p> <p>24 a matter of the culture. And then if you typically</p>	Page 259	<p>1 CERTIFICATE</p> <p>2</p> <p>3 I HEREBY CERTIFY that the witness was duly</p> <p>4 sworn by me and that the deposition is a true record</p> <p>5 of the testimony given by the witness.</p> <p>6 It was requested before completion of the</p> <p>7 deposition that the witness, DR. YORAM (JERRY) WIND,</p> <p>8 have the opportunity to read and sign the deposition</p> <p>9 transcript.</p> <p>10</p> <p>11 </p> <p>12 LISA DEPASCALE</p> <p>Court Reporter and Notary Public for the</p> <p>13 Commonwealth of Pennsylvania and Delaware</p> <p>Dated: July, 8 2024</p> <p>14</p> <p>15</p> <p>16</p> <p>17 (The foregoing certification of this</p> <p>18 transcript does not apply to any reproduction of the</p> <p>19 same by any means, unless under the direct control</p> <p>20 and/or supervision of the certifying reporter.)</p> <p>21</p> <p>22</p> <p>23</p> <p>24</p>	Page 261

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1 INSTRUCTIONS TO WITNESS 2 3 Please read your deposition over carefully and 4 make any necessary corrections. You should state the 5 reason in the appropriate space on the errata sheet 6 for any corrections that are made. 7 After doing so, please sign the errata sheet and 8 date it. 9 You are signing same subject to the changes you 10 have noted on the errata sheet, which will be attached 11 to your deposition.	12 13 14 15 16 17 18 19 20 21 22 23 24	1 ACKNOWLEDGMENT OF DEPONENT 2 3 4 I, DR. YORAM (JERRY) WIND, do hereby certify 5 that I have read the foregoing pages, 1-263, and that 6 the same is a correct transcription of the answers 7 given by me to the questions therein propounded, 8 except for the corrections or changes in form or 9 substance, if any, noted in the attached Errata Sheet. 10 11
Page 262	DR. YORAM (JERRY) WIND DATE	Page 264
1 ERRATA SHEET 2 DR. YORAM (JERRY) WIND Job No. TX6782840 3 DEPO DATE: 7/8/2024	1 LAWYER'S NOTES 2 PAGE LINE 3 _____	
4 PAGE LINE CHANGE 5 _____ _____	4 _____	
6 REASON: _____	5 _____	
7 _____	6 _____	
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24 REASON: _____	23 _____	
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1 Cameron M. Nelson - nelsonc@gtlaw.com
2 July 15, 2024
3 RE: American Airlines, Inc. v. Skiplagged, Inc.
4 DEPOSITION OF: Dr. Yoram (Jerry) Wind (# 6782840)
5 The above-referenced witness transcript is
6 available for read and sign.
7 Within the applicable timeframe, the witness
8 should read the testimony to verify its accuracy. If
9 there are any changes, the witness should note those
10 on the attached Errata Sheet.
11 The witness should sign and notarize the
12 attached Errata pages and return to Veritext at
13 errata-tx@veritext.com.
14 According to applicable rules or agreements, if
15 the witness fails to do so within the time allotted,
16 a certified copy of the transcript may be used as if
17 signed.
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